

Scope of Work

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I. SCOPE OF SOLICITATION

Clemson University has recognized a gap in delivering, tracking, and reporting required training or certifications. As our legislative environment changes, other future requirements may have to be adopted and cascaded through the University. The impetus for conducting this selection process for a training management system is to address the growing concern in our ability to appropriate enroll, deliver, track, and report completion of required training or certifications across campus. This request is for a Training Management System that is specifically designed for required training for employees (staff, faculty, and student workers) and the format does not follow an academic cycle or academic degree seeking type of training.

Award

The 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 based on the initial product license, annual maintenance fee, and professional services for training and implementation.

The renewal of this contract for the Training Management Solution will be determined by Clemson University.

Contract Period

Any resulting contract will begin on the date specified in the notice of award. Configuration, installation and service will begin as soon as possible after the award is made. Timelines for configuration, installation and service needs to be specified in the submitted proposal.

The effective date of this contract is the first day of the Maximum Contract Period as specified in the final statement of award. For bids where award statement is not required, the effective date of the contract will be the issue date on the Purchase Order.

The initial contract should be for two years and the initial term may extend to the end of the calendar year (December 2027). At the end of the initial term, and at the end of each renewal

term, this contract shall automatically renew for a period of one year, unless contractor receives notice that the University elects not to renew the contract at least thirty (30) days prior to the date of renewal. Said renewals may be less than, but will not exceed, one additional one-year period for a maximum contract term of five years. Regardless, this contract expires no later than the last date stated on the final statement of award.

Timeline for Project Implementation

The Training Management System that will be purchased must contain all of the required elements specified and as many of the desirable features mentioned in this RFP. The system should offer ease of use for administrators and users of the system. The vendor should be capable of implementing and training all of those involved in teaching and supporting delivery and reporting of federal, state, and Clemson University mandated training and certifications by late summer 2023, with the intention to rollout campus wide immediately thereafter. Training and implementation will be provided onsite by the selected Training Management System vendor.

Deadline for Receipt of Questions: All questions must be emailed to Kevin Finan at kfinan@clemson.edu prior to October 4, 2022, 12:00 Noon ET.

II. INSTRUCTIONS TO OFFERORS

Regardless of specific requirements below or in this document, Offerers are required to submit their proposal electronically through the Clemson University online bidding system. To do so you must login (registering first) at <https://clemson.ionwave.net/Login.aspx>, 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 pricing information) and one file as a financial proposal. ***Failure to submit the two separate bid files may cause a bid to be deemed non-responsive and removed from further considerations. 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.

All information should be presented in the order listed below.

The proposals shall be organized in the order specified in this RFP. A proposal that is not organized in this manner risks elimination from consideration if the University is unable to find where the RFP requirements are specifically addressed. Failure to provide information required by this RFP may result in rejection of the proposal.

The Offeror must submit a detailed technical explanation of the proposed solution to include, but not limited to:

1. TECHNICAL PROPOSAL

Offerors must submit a Technical Proposal that addresses each requirement listed in Section III, Scope of Work/Specifications of this RFP as well as items below. Your offer should include enough detail to demonstrate an understanding of each requirement and the scope of project.

1.1 Cover Letter

Offeror 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 Training Management System.

1.2 Table of Exceptions

Offers must not take exceptions to Clemson University's terms and conditions or otherwise qualify their bid, as this will be grounds for rejection of offer due to non-responsiveness. However, if Offeror does not fully comply with any **desirable** technical or performance requirements identified herein, Offeror shall provide a list of detailed exceptions to these preferences. This list must be in table form and must identify the page, section number, provision and specific exception, and/or non-conformance.

1.3 Executive Summary

The Executive Summary shall condense and highlight the contents of the solution being proposed by the Offeror in such a way as to provide the Evaluation Committee with a broad understanding of the Offeror's Technical Proposal. Offerors 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. Offerors 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.

1.4 Corporate Overview

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

a. Offeror Identification and Information

The 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 organization has changed since first organized.

b. Judgments/Litigations

The 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. 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 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. Office Location

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

e. Contract Documents

The 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.

1.5 Qualifications**a. Summary of Offeror's Corporate Experience**

The Offeror shall provide a summary matrix listing 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 Offeror during its evaluation of the proposal.

The 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 offeror's responsibilities.
5. For reference purposes, a customer name (including the name of a contact person, a current telephone number, and e-mail address). It is preferred that at least one reference is from a higher education institution and a minimum of three references be provided. 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.
6. 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.

b. Integration Partners

List current companies with which the software is compatible.

c. Offeror Key Staff

The Offeror is expected to propose sufficient staff with the requisite skills and abilities to meet all requirements in this RFP. The 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, the Offeror must provide representative job descriptions for any other positions identified in the Offeror's proposed staffing plan.

The 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.

1.6 Consulting/Development/Customization/Programming Services

A detailed plan for future consulting, development, customization and programming services will be submitted based on fixed hourly rate to include travel, meals, lodging and all expenses as a firm, fixed price. This pricing will not be used in evaluation but may be negotiated.

1.7 Location of Cloud Services Data Centers

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

1.8 Maintenance/Support Agreement

Maintenance/Support Agreement must include, but not be 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.

1.9 Agreements

Include any forms or agreements (i.e. Service Level Agreements, Business Associate Agreement) to include performance commitments. These documents must not have any conflicting terms with this solicitation.

1.10 System Uptime

Provide complete details of service uptime. Clemson prefers an uptime of 99.99%. Include average response times for mission-critical failures/emergencies.

1.11 Implementation Plan

Offerors shall provide a detailed implementation plan that includes a timeline with dates of initiation, milestones, and completion and include all requirements, if any, for university resources that must be used for each step of the implementation.

1.12 Training

Describe any training and reference resources available to the users. Include if resources are available to all users within the system or a select number of designated users. The Offeror must supply initial technical training on the proper use of any software 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 Offeror shall also identify user groups and additional training resources that might be beneficial to Clemson University's implementation.

1.13 Payment Schedule

Offeror must outline timeframe for payment schedule (x up front, x when go live, annual fee due x time of year). Do not include actual cost here in Technical Proposal Response. Just include percentages, milestones, deliverables and timeframe for payments to be applied.

1.14 Quality Assurance Plan

The Offeror must develop and submit a Quality Assurance Plan that supports all core responsibilities of this RFP. The plan must describe how the Offeror 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 University.

1.15 Third Party Use

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

1.16 Appended Software

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

1.17 Conversion/Migration/Integration

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

1.18 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.

1.19 Security/Administration

- a) All of the selected vendor's personnel providing services are responsible for protecting their access privileges and for maintaining confidentiality and proper use of the University's data in accordance with University's policy. Personnel will not disclose or distribute data in any medium, except as required by responsibilities under the contract.
- b) Solutions must comply with all applicable laws and regulations commonly found in a higher education environment as well as timely implementation of compliance with future changes to laws and regulations. Current laws and regulations include, but are not limited to: FERPA, Clery Act, ADA 508 compliance, COPPA, HIPAA, etc.
- c) Offerors should also include documentation of how Clemson University data is kept secure and confidential.

1.20 Insurance

The successful Offeror shall provide satisfactory evidence of all required insurance coverage and licenses prior to performance or as part of the technical proposal.

1.21 Attachment A – Technical Requirements

Offerors must provide a complete response for all items outlined in Attachment A as part of this Technical Proposal.

1.22 Response to Section III

All Offerors must provide a detailed explanation of how their solution will accommodate each requirement outlined in Section III.

1) **2. FINANCIAL PROPOSAL (Separate document and/or attachment – do not include any pricing in Technical Proposal)**

- a. Offerors must review Section VI, Financial Proposal and list all anticipated costs associated with their proposed solution for the total potential term (initial year plus four option years) of the contract. Itemized cost should include, but are not limited to: initial cost of software, annual customer/technical support, annual maintenance, implementation/installation, on-site, hands-on training and all other applicable costs.
- b. Offerors must complete this table as part of offer and re-attach completed table under "Response Attachments" tab of online bidding system.

- 11) c. Clemson University is requesting pricing for a maximum of unlimited users
- 12) with optional pricing for 12,000 users, 12,000 to 20,000, 20,000 to 40,000. Clemson
- University does not guarantee an award for unlimited users; however, evaluation will
- be based on pricing for unlimited users annually. A firm, fixed price must be
- provided for unlimited users or for the option stated above. A firm, fixed price
- must be provided for the system to accommodate our current size and structure, as
- well as some future growth. Pricing will be negotiated with successful Offeror prior
- 13) to making an award.
- 14) d. Pricing must include a minimum of two environments (Test and Production).
- 15) e. Offeror's Financial Proposal must be submitted as a separate file from the
- 16) Technical Proposal.
- 17) f. Pricing must be inclusive of all to include any travel, meals, lodging and other
- 18) expenses.
- 19) g. Your separate Financial Proposal may go into more detail in terms of pricing
- 20) breakdown, options, etc., but it must also clearly indicate the price you enter
- 21) into the online bidding system. This is the price that will be used for evaluation
- 22) purposes and should reflect the firm, fixed price for the base technical proposal
- 23) you are offering in response to the solicitation. If there are conflicts in the
- 24) pricing you propose or Clemson cannot clearly determine a total price of your
- 25) proposal, your response may be deemed non-responsive.
- 26) h. Please include, if applicable, the hourly rate for future consulting services, or
- 27) needed assistance once the installation and training has occurred. Also, include
- 28) a future-oriented schedule detailing possible expansion pricing scenarios.

29)

30)

31) **III. SCOPE OF WORK / SPECIFICATIONS**

32)

33) **1. GENERAL REQUIREMENTS**

34) **1.1 University Vision**

- 35) a) Easy to Use: intuitive design, efficient to manage, quick to create, edit and/or
- 36) achieve tasks
- 37) b) Elegant and functional design
- 38) c) Reliable and robust: stable, high quality assurance, high uptime, fault tolerant
- 39) d) Available: accessible anytime, anywhere
- 40) e) Extensible and interoperable: accessible source code for API calls
- 41) f) Scalability: Able to scale for increased usage
- 42) g) Accessibility: Adheres to Section 508 of the Rehabilitation Act

43) **1.2 UI Experience**

- 44) a) Trainee experience: easy navigation and access to important content and
- 45) information

- b) Administrator experience: ease of system administration and flexibility in establishing roles and workflows
- c) Facilitator/Instructor/Proctor/Trainer experience:
 - ❖ Reduces the number of clicks and load times needed to access, create and launch content
 - ❖ Streamlined production process and ease of use in creating content
- d) Common interface throughout the system and tools
- e) Compatible across platforms and browsers

2. TECHNICAL REQUIREMENTS

2.1 System Structure:

- a) Scalability: Support 12,000+ employees and multiple courses (include details of an architecture that would support these numbers).
- b) Provide substantial storage space. Offeror shall detail the storage offering of proposal.
- c) Provide timely updates, prompt bug fixes, and iterative feature improvements.
- d) Provide a test environment for testing integrations, plug-ins, new features or rollouts.
- e) Provides a production environment.
- f) Solution must be cloud based, vendor hosted.

2.2 Security:

- a) Data redundancy to ensure availability and recoverability.
- b) Secure transmission and storage of data.
- c) Comply with all applicable laws and regulations commonly found in a higher education environment. Current laws and regulations include, but are not limited to FERPA, Clery Act, ADA 508 Compliance, COPPA, HIPAA, Section 508 of the Rehabilitation Act.
- d) Vendor's personnel services are responsible for protecting access privileges and maintaining confidentiality and proper use of the University's data. Personnel will not disclose or distribute data in any medium, except as required by responsibilities under the contract.
- e) Offeror shall describe, in detail, the process for scrubbing or purging data upon request of institution or upon sun setting of service.
- f) Offeror shall include documentation of how Clemson University's data is kept secure and confidential.

2.3 Extensibility, integration with custom or third-party tools:

- a) Provide an open API to export or import data.
- b) Work with major third-party tool providers for integration.
- c) Offeror should describe any compatibility or interoperability with desktop productivity tools (Microsoft Office, etc.).
- d) Assure secure transmission and storage of data.

- 91) e) Support external publisher content.
- 92) f) Support quiz and content creation.
- 93) g) Support video-based assignments.
- 94) h) Support course completion/acknowledgement.
- 95) i) Support reporting of course completion/acknowledgement.
- 96)

97) **3. DATA BACKUP, INTEGRATION, IMPLEMENTATION AND SUPPORT**

98)

99) **3.1 Comprehensive integration and installation plan:**

- 100) a) Describe all components of proposed system.
- 101) b) Define all interface capabilities.
- 102) c) Provide detailed timeline.
- 103) d) Successful vendor must provide a comprehensive installation that includes:
 - 104) i. *Plan to migrate historical training data from current system*
 - 105) ii. *Vendor project manager who has in-depth knowledge of full system.*
 - 106) iii. On-site training.
 - 107) iv. On-site go-live assistance.
 - 108) v. Requires minimal additional IT or other technical resources from Clemson University to develop and/or maintain proposed system.

109) **3.2 End-User Support:**

110) **Provide comprehensive ongoing customer support plan to include:**

- 111) a) Training/consulting and end-user documentation (include from RFP selection to Go Live)
- 112)
- 113) b) **Provide customer support during standard business hours of Clemson University (EST – 8AM ET to 5PM ET) with initial vendor response time falling less than one (1) hour after initial contact from customer.**
- 114)
- 115)
- 116) c) Must provide toll free telephone number.
- 117)

118) **3.3 Disaster Recovery Needs**

- 119) a) Provide automated failover and nightly off-site replication to secondary hosting region w/rapid recovery in support of Disaster Recovery needs.
- 120)
- 121)

122) **4. SYSTEM REQUIREMENTS**

123) **(Describe the ability to do the following):**

124)

125) **4.1 Content Design and Creation:**

- 126) a) Support all the file formats – including sharable content object reference model (SCORM). . . any others should be explicitly stated.
- 127)
- 128) b) Provide rich editor with both WYSIWYG and HTML view.
- 129) c) Functionality for collaborative editing and versioning (preferred).
- 130) d) Provide built-in document viewer.
- 131) e) Ability to easily link to files, web sites, and other parts of the course.
- 132) f) Ability to easily find and embed multimedia, such as video and audio.
- 133) g) Ability to easily store, convert, and stream (or pseudo-stream) video.
- 134) h) Ability to easily embed other external content.

- i) Provide rich media creation tools, including multimedia, throughout the system (i.e. in content pages, in quiz questions, etc.).
- j) Secures creation, storage, and delivery of content to prevent hacking.
- k) Ability to accept any file type.

4.2 Content Organization:

- a) Organize pages or modules, including any part of the course.
- b) Organize and sequence content to allow for conditional release or pre-requisites.
- c) Training Plans by EE with ability to record certifications where training is not housed in the tool (template). (Could be added to 3.2)
 - EEs can be assigned a training plan as well as individual courses
 - EEs can be assigned more than one training plan
- d) Establish sub-accounts or branch accounts separate from main account*
- e) Ability to add non-Clemson employees to the training system and allow administration by local coordinator*

4.3 Course Copy:

- a) Update due dates of associated content.

4.4 Calendar:

- a) Create date-based assignment.

4.5 Assessments:

- a) Provide rich, integrated assignment descriptions.
- b) Direct submission of text, images, video, or audio for administrators and facilitators.
- c) Allow multimedia submission for administrators and facilitators.
- d) Allow group or individual assignments.
- e) Allow for resubmission.
- f) Solution facilitates, tests, exams, quizzes, and surveys.
- g) Supports a variety of question types.
- h) Ability to determine pass/fail grades.

4.6 Question Banks:

- a) Can be imported from publisher packages.
- b) Can be accessed from other courses.
- c) Can be created and shared.
- d) Supports organizing questions into groups.
- e) Allows for randomization of questions and answer choices.

4.7 Messaging:

- a) Ability to message a user, instructor, or entire group.
- b) Provide instant notifications to alert users of new content, course requirements, course changes, or course due dates. Should be able to communicate through emails (automated or pushed).
- c) Provide ability for supervisors and administrators to email users of required training.

4.8 Collaboration:

- a) Supports course groups, with either automated assignment or self-sign-up.
- b) Ability to lock quizzes if users fail after so many attempts.

4.9 Mobile Device Functionality/Compatibility:

- a) Provide essential functionality in mobile browsers.
- b) Provide enhanced functionality through mobile apps.
- c) Provide a complete learner experience.

4.10 Migration:

- a) Allow complete import from a variety of sources, including publishers and other Training Management System specifically our existing LMS's.

4.11 Reporting Tools:

- a) Offer visualization of course activity including completion, progression and compliance status.
- b) Provide tools for user reporting.
- c) Standardized report functionality to include:
 - i. Institution-wide reports
 - ii. Standard course reports
 - iii. Standard user reports
 - iv. Department/unit level reports
- d) All reports should be visible to a hierarchy of management, system administrators, and trainers.
- e) Allow for reports to be downloaded in an Excel format.

4.12 Administration:

- a) Sections and cross-listings can be created manually or automatically.
- b) Users can be enrolled in a course automatically, or manually.
- c) Describe the levels of access or restriction relating to the Training Management System user roles and rights.
- d) Describe the Training Management System infrastructure maintenance process, frequency, and notification to customers.
- e) Describe the upgrade process and schedule.
- f) Ability to test upgraded and updated features prior to release.
- g) Describe what reporting capabilities the Training Management System supports for administrative analysis and troubleshooting.
- h) Describe the security model, including network, data, and application security.
- i) Provide evidence of both physical and logical data security with regard to all data, especially user information.
- j) Detail the levels of encryption that the Training Management System utilizes.
- k) Describe the tools that the system provide to create, copy, archive, and delete courses and users.
- l) Varying levels of administrators.

Ability to add non-Clemson employees to the training system and allow administration by

*local coordinator***4.13 Training and Technical Support:**

- a) Offer quality, customized training materials/resources that include online and multimedia training tools and resources for administrators, instructors, staff, and users.
- b) 24x7x365 tiered support for technical support staff.
- c) Web-based support ticket system and live chat, procedure for escalating the support issues.
- d) Provide active community forums.
- e) Offer accessible feature request forms.

5. SYSTEM DESIRABLE FEATURES**(Describe the ability to do the following):**

5.1 Contains a list of prebuilt templates (to aid with visual design) that can be used when building course sites.

5.2 Multiple visual text editors available.

5.3 Ability for an instructor to maintain a repository (within the Training Management System) of frequently used course content from previous/current semesters that can be copied into other courses.

5.4 Ability to preserve page integrity (formatting, etc.) when copying and pasting from common word processing programs.

5.5 Ability to produce a web calendar feed for subscription via Outlook, iCal, Google Calendar, etc.

5.6 Ability for users to create profile including:

- a) Allow for profile picture
- b) Support multiple contact methods based on user preferences
- c) Allow personalization to show bio, web sites, etc.
- d) Sections and cross-listing can be done manually or automatically

5.7 Allow integration with collaborative document tools like Google Docs, Box.com, and OneDrive.

5.8 Announcements:

- a) Allow use of announcements in system.
- b) Allow administrators and facilitators to email an announcement

IV. TERMS AND CONDITIONS – SPECIAL

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 Offertory will be ranked from most advantageous to least advantageous.

1. **Financial Proposal:** The total cost of ownership for the base solution for the potential five-year contract period.
2. **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.
3. **Demonstration:** On-site demonstration of proposed product's capabilities to meet the needs of the University as defined in this RFP.
4. **Proposed Solution:** The degree, completeness, and suitability of the Offeror's proposed technical solutions to meet or exceed the requirements of this RFP

DEMONSTRATION:

After the evaluation of the Proposed Solution (Technical Proposal), Offeror's Qualifications and factoring the Financial Proposal into the evaluation as outlined by the points assigned to each of those criterion above, all Offerors' proposals ranked close enough to the highest scoring Offeror where the award of points allowed for a demonstration could shift the final ranking, will be asked to provide a demonstration. These Offerors will then be evaluated based on the number of points listed above for the on-site Demonstration Criterion.

Demonstrations are tentatively set for October, 2022. Please mark your calendars accordingly. The following requirements apply to demonstrations.

1. Offerors invited to demonstrate will be required to give a scripted demonstration of their proposal to clarify or verify the contents and the representations made therein.
2. The University may choose to provide in advance a sample project for Offerors to use for demonstration.
3. Demonstrations given by an Offeror under this section are permitted and communication by the Offeror with the Using Governmental Unit or its employees during a demonstration will not violate the restrictions applicable to Offerors.
4. The presentation will be made 'in person' at Clemson University, and any travel expenses incurred by the Offeror are the Offeror's sole responsibility. The location

within campus will be provided to the invited Offerors at a later date as the availability of a presentation room is confirmed.

5. The presentation room will have audiovisual capabilities, but Offerors invited to demonstrate will be required to furnish all equipment, items, and services they need for a complete, successful presentation. Clemson University will provide only power and internet access.
6. The time allotted per individual Offeror shall not exceed two (2) hours, consisting of 30 minutes set-up and dismantling and 1.5 hours of presentation. Presentations will be scheduled on the dates outlined above.
7. The activities of the Offeror should be limited to a scripted demonstration of the Training Management System described in the Offeror's written proposal. Evaluators may ask questions pertaining to the Offeror's demonstration. The Offeror's answers are restricted to statements of facts.
8. Offerors will not be allowed or permitted to introduce new information. Negotiation is not permitted at this stage in the procurement process and an Offeror may not change its proposal.
9. The Offeror may be required to document an answer if such a written clarification is determined to be in the best interest of the University.
10. The demonstration should be conducted in a straightforward manner in order to secure a clear and meaningful understanding of the Offeror's proposed solution.
11. The demonstration is designed to satisfy the evaluation panel's need for clarification and understanding of the information that was provided in the Offeror's written proposal. Therefore, the Offeror may neither ask questions, divulge any cost information, nor receive preliminary assessments on its proposal from the members of the panel.

NOTE: After demonstrations are considered and factored into the evaluation process, the highest Total scorer will be the apparent winner, subject to negotiations and validation by Clemson University Procurement Services Procurement Officer.

V. APPENDICES TO SCOPE OF WORK

Appendix A – CCIT RFP Technical Requirements(as applicable) Please pay very close attention to the section regarding Accessibility

General Requirements

- All of the selected vendor's personnel providing services are responsible for protecting their access privileges and for maintaining confidentiality and proper use of the University's data in accordance with the University's policy. Personnel will not disclose

or distribute data in any medium, except as required by responsibilities under the contract.

- Solutions must comply with all applicable laws and regulations commonly found in a higher education environment as well as timely implementation of compliance with future changes to laws and regulations. Current laws and regulations include, but are not limited to: FERPA, Clery Act, ADA, the Rehabilitation Act of 1973 Section 504 & 508, COPPA, HIPAA, etc. Please refer to Clemson's Privacy Policy, <http://www.clemson.edu/privacypolicy.html>
- Offerors shall provide a detailed implementation plan that includes a timeline with dates of initiation, milestones, and completion and include all requirements, if any, for university resources that must be used for each step of the implementation.
- The selected vendor must supply initial technical training on the proper use of any software solution. Offerors shall include this training in the proposal. The training must be sufficient to enable technical individuals designated by Clemson to fully understand, test, validate, use tools, 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. Offerors shall identify user groups and recommend additional training resources that might be beneficial to Clemson University's implementation.

Technical

- **User Interface**
 - **Browser Compatibility (if UI is browser based)**
 - Offerors shall identify all platforms and browsers compatible with proposed solution
 - **Client (if UI is installed on local systems)**
 - Offerors shall identify all operating systems/platforms compatible with proposed solution
 - Solution should not require client-side Java but if required, shall be compatible with the then current version of Java
 - Solution should not require client-side Flash but if required, shall be compatible with the then current version of Flash
 - **Mobile Compatibility**
 - Offerors shall identify all mobile platforms compatible with proposed solution.
 - Prefer iOS because > 80% of all mobile traffic on campus is iOS, but should also support other platforms.
 - **Virtual Desktop compatibility**
 - Offerors shall identify if Virtual desktop configuration is possible and if so, what virtual desktop configurations are compatible with proposed solution.
- **Application Architecture**

- Solution shall utilize currently supported versions of application frameworks (Java, PHP, etc.)
- Offeror should describe any compatibility or interoperability with desktop productivity tools (Microsoft Office, etc.)
- Offeror should describe the Application Programming Interface (API) if available.
- Offeror should describe the Application Server environment required for the proposed solution.
- Software sold or licensed to Clemson to be installed, maintained, or run by Clemson personnel must not have a dependency on Oracle Java (JDK, SE, EE, or ME), unless licensing and maintenance costs for Oracle Java, for the life of the product, are included in the purchase price. Preference for software based on Java technology will be given to vendors utilizing the OpenJDK framework.
- Recommended Architectural designs provided by the offeror shall be resilient and able to be run with a minimum of downtime in a cloud environment.
- No Flash
- **Database Services**
 - Solution shall be compatible with one of the following currently supported database technologies: Oracle or MS SQL
 - Offeror should provide technical documentation regarding configuration and installation including backup/maintenance scripts for proposed solution
- **Web Services**
 - Solution shall be compatible with CU's Web Server hosting requirements:
 - For linux-based systems:
 - Before 1/1/2015: Oracle Enterprise Linux 6.x.
 - After 1/1/2015: Oracle Enterprise Linux 7.x or above
 - For Windows-based systems:
 - Windows Server 2012 R2 or above.
 - Please note the Oracle Enterprise Linux is a variant of RedHat Enterprise Linux (RHEL)
- **Accessibility**
 - **Offerors must provide an Accessibility Conformance Report (ACR) for their solution.**
 - The ACR must be based on a Voluntary Product Accessibility Template® (VPAT®) version 2.1 or higher, provided by the [Industry Technology Industry Council](#) (ITIC).
 - The ACR must include conformance to [Web Content Accessibility Guidelines](#) (WCAG) version 2.0 levels A and AA.
 - The ACR must be completed according to the instructions.
 - If the solution has multiple forms (i.e. web version, desktop version, and mobile app), then either the provided ACR clearly covers the results of each form or an ACR for each form is provided.
 - **Offerors must provide a supplemental accessibility statement including the following:**
 - The offeror's commitment to providing accessible solutions.

- Processes and practices used to ensure accessibility, including the frequency in which the ACR is renewed.
 - A list of any unsupported or partially supported criteria in the ACR that have since been remediated.
 - A roadmap, including target dates, for remediation of all applicable criteria in the ACR that are not listed as supported.
 - Any accessibility or usability features provided by the solution.
 - Any known accessibility limitations of the solution.
 - Any configuration or installation requirements to provide accessibility.
 - Contact information for reporting accessibility issues.
- **If the solution is an authoring tool used to generate electronic content (e.g. documents, web pages, multimedia):**
 - Offerors must describe how the solution generates accessible content.
 - Offerors should provide documentation to guide end users in the generation of accessible content.
 - Offerors should provide samples of accessible generated content.
- **Offerors should be able to demonstrate the following:**
 - Operation of the entire application using only the keyboard, including a visual focus indicator and logical navigation order.
 - Operation of the application with a screen reader (i.e. JAWS, NVDA, VoiceOver).
 - Zooming the text size to 200% without loss of functionality.
 - A color contrast ratio of at least 4.5:1 for text and images of text, with the following exceptions: large text should have a 3:1 contrast ratio; decorative text and logotypes have no contrast requirements.
 - Where a user can find accessibility features, settings, and support within the application, including contact information for assistance.
- **Security**
 - If data is utilized, processed or otherwise stored in offeror's solution and subject to any regulatory requirements, offeror must describe and provide documentation of processes and practices that support the necessary regulatory controls for applicable data elements.
 - if solution requires confidential, sensitive or otherwise protected data transmissions, solution shall utilize a secure, encrypted method of transport (e.g. Secure Socket Layer (SSL), VPN, etc.)
 - Offeror shall describe in detail the retention of any user activity logs, and other system information (including but not limited to unauthorized login attempts, successful logins, event times, etc) of the proposed solution.
 - Upon request the offeror shall provide timely review of any actively logs that are requested.
 - Solution shall provide multiple (tiered) security levels within the application. (ex: RBAC, etc)
 - Offerors should also include documentation of how Clemson University data is kept secure and confidential.
 - Customer (CU) will require an Annual review of SOC1 (SSAE16), SOC2 reports for all vendor hosted solutions
 - Offerors shall describe and provide documentation of how data is maintained in backup, the extent/duration and method of backups, timely destruction of backups

(automated and upon request), and destruction (purge) of all client data upon separation.

- Offeror must describe and document the level of access to client data by offeror's staff or affiliates, safeguards in place to prevent any unauthorized access by offeror's staff or affiliates, and any regular review of access rights, privileges and activity by offeror's staff.
 - We need to add language to confirm our right to audit vendors/supplier their method to provide software:
 - Offerors shall be required to disclose whether or not any data, telemetry or otherwise, is sent back to the vendor at any time during the license period. Offerors shall disclose the nature of the data and provide representative samples of the data. If at any time during the license period additions are made to the data that is sent back to the vendor, Clemson will be notified of the change at least 60 days in advance.
 -
- **Disaster Recovery**
 - Offerors software shall be compatible with current CU disaster recovery strategies that can meet the business expected recovery time objective (RTO) and recovery point objective (RPO).
- **Integration**
 - **Authentication**
 - Solution shall support one of the following for end user authentication (not required for administrator access)
 - Shibboleth (Preferred)
 - Active Directory authentication integration (Preferred)
 - Secure LDAP authentication.
 - SHA-1 user/password hashing - any stored passwords must be encrypted
 - **API for provisioning - solution should support one of the following**
 - REST (Preferred)
 - SOAP
 - NetIQ IDM driver
 - other HTTP based protocols
- **Configuration/Deployment Management**
 - SaltStack is the configuration/deployment management system used by Clemson University.
 - If a CU Hosted system is to be installed or configured by the offeror's personnel, SaltStack "states" should be provided by the offeror to facilitate automated provisioning and configuration. If unable to provide the SaltStack "states", the offeror shall allow in the contract sufficient consulting hours to develop the appropriate Saltstack "states" in collaboration with Clemson personnel.
 - Any license management solution based on a physical object, such as a USB key or dongle is not acceptable.
- **Network**

- Offeror shall describe in detail what network access and bandwidth is required for proposed solution.
 - Solution shall be IPV6 compliant
- **Right to Audit (Fair Audit Clause)**

We have recent audit finding that is mention need to add Right to Audit language in our future purchases. Here is an example of standard. We need to have this vetted by GCO or our procurement reviewer (Jennifer S.).

 - Contractor agrees to have an independent third party **audit** performed at least once a year. The **audit** results (generally provided in a SOC report) and the Contractor's plan for addressing **audit** issues shall be shared with the Institution upon request.

Physical

- **CU Hosted Solutions:**
 - Solution should operate in a virtual server or container environment.
 - Offeror shall describe in detail the minimum and recommended server configurations including, but not limited to, Operating System, CPU, Memory, Disk Space, and firewall exceptions for each server and instance required.
 - Offeror shall describe in detail any 3rd party software (including version) required for the proposed solution.
 - Offeror shall adhere to the standard supported operating systems of Clemson University
- **Vendor Hosted Solutions:**
 - Data may only be used in such a way as to accomplish the assigned task or as directed by Clemson University.
 - Solution shall provide a mechanism for Clemson University to control user and system level access to all functions of the hosted system where applicable. This access should include utilizing Clemson University's [Shibboleth](#) implementation for user level access.
 - Solution shall provide a mechanism for Clemson University to accurately monitor the system status including, but not limited to, the up/down status of the hosted system.
 - Vendor shall not store any Clemson University data in a facility outside of the United States.
 - Solution shall provide a mechanism to allow Clemson University to receive data files for consumption by, but not limited to, the Clemson University Data Warehouse. Vendor shall design this transfer in a way as to allow it to be scheduled and fully automated as well as fully controlled by Clemson University.
 - Vendor shall provide Clemson University a mechanism to review and export security data from the hosted solution. This data should include, but not be limited to, login history, record modifications, and user location information.
 - Customer (CU) will require an Annual review of SOC1 (SSA16) reports
 - CCIT Business Continuity/Disaster Recovery Team will require an annual review of the vendor disaster recovery plan or a SOC2 report. The SOC2 report should indicate annual disaster recovery tests proving a recovery time objective (RTO) and recovery point objective (RPO) that is acceptable to the purchasers business

requirements in the event of an event at the vendor site that will impact CU's ability to do business.

- o CCIT Business Continuity/Disaster Recovery Team will require an exit strategy that can be tested annually. This will consist of a database backup of CU data being recoverable at a CU datacenter. The application may not be present but the system administrator should be able to recover the database of CU data at CU primary data center and validate record counts.
- o CCIT Business Continuity/Disaster Recovery Team will require the primary and secondary hosting site be located a minimum of 150 miles apart and from Clemson, SC.

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VI. BIDDING SCHEDULE/FINANCIAL PROPOSAL

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See following pages

VI. BIDDING SCHEDULE/FINANCIAL PROPOSAL

BID IN ENGLISH & DOLLARS - Offers submitted in response to this solicitation shall be in the English language and in US dollars.

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

	<i>Pricing</i>					
<i>Price 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>
Price of Software (to accommodate unlimited users, as indicated in Section II, #2, Financial/Pricing Proposal) with two environments – Test and Production.						
Software Maintenance & Support years 1-5 (to accommodate unlimited users as indicated in Section II, #2, Financial/Pricing Proposal) with two environments – Test and Production.						
Appended Software (if applicable)						
Training						
Implementation						
Documentation & Training Materials						
Additional Professional Services						
Any Other Costs not defined above						
TOTAL (For Evaluation Purposes)						

Total for years 1-5 above will be used for evaluation purposes and considered to be the “Base Solution” pricing. This Base Solution pricing (years 1-5) must be transferred to Total Price for Line Item #1 in Online Bidding system as well.

Offeror should clearly list optional items and any other charges associated with any item in their financial proposal. A detailed breakdown that your total, fixed price is based on must be included as part of your Financial Proposal.

The Offeror should not include any technical information in the financial proposal.

Optional Pricing (12,000 Users):

	<i>Pricing</i>					
<i>Price 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>
Price of Software (to accommodate 12,000 users as well as some future growth as indicated in Section II, #2, Financial/Pricing Proposal) with two environments – Test and Production.						
Software Maintenance & Support years 1-5 (to accommodate 12,000 users as well as some future growth as indicated in Section II, #2, Financial/Pricing Proposal) with two environments – Test and Production.						
Appended Software (if applicable)						
Training						
Implementation						
Documentation & Training Materials						
Additional Professional Services						
Any Other Costs not defined above						
Total Optional Pricing (will not be used for evaluation purposes)						

Optional Items:

(This pricing will not be used in the evaluation but may be negotiated.)

001	1	Day	Optional Item - This item will not be used for evaluation purposes but is an optional item to handle any additional off-site training needed beyond what is included in initial software training as specified in table above. Please indicate daily rate for off-site training.	\$_____/day
002	1	Day	Optional Item - This item will not be used for evaluation purposes but is an optional item to handle any additional on-site training at Clemson University needed beyond what is included in initial software training as specified in table above. Please indicate daily rate for on-site training to include travel, meals, lodging and all expenses.	\$_____/day
003	1	HR	Optional Item – This item will not be used for evaluation purposes but is an optional item to handle any future programming/development/customization/consulting services. Pricing for future programming/development/customization/consulting services based on hourly rate as outlined in Scope of Work above. Rate must be all inclusive of travel, meals, lodging and all expenses.	\$_____/hr.

Attachment A – Technical Requirements

Offerors must provide a complete response for all items outlined in this attachment per Scope of Work, Section II, Instructions to Offerors, 1.21.

A1. Technical

A1.1 User Interface

- a) Browser Compatibility (if UI is browser based)
 - Offerors shall identify all platforms and browsers compatible with proposed solution
 - Clemson University will not approve systems that require client side Java or Flash in order to function
- b) Client (if UI is installed on local systems)
 - Offerors shall identify all operating systems/platforms compatible with proposed solution
- c) Solution should not require client-side Java Solution should not require client-side Flash Mobile Compatibility
 - Offerors shall identify all mobile platforms compatible with proposed solution.
 - IOS and Android compatibility are required.
- d) Virtual Desktop compatibility
 - Offerors shall identify whether Virtual desktop configuration is possible and if so, what virtual desktop configurations are compatible with proposed solution.

A.1.2 Application Architecture

- a) Solution shall utilize currently supported versions of application frameworks (Java, PHP, etc.)
- b) Offeror should describe any compatibility or interoperability with desktop productivity tools (Microsoft Office, etc.)
- c) Offeror should describe the Application Programming Interface (API) if available.
- d) Offeror should describe the Application Server environment required for the proposed solution.

A.1.3 Database Services

- a) Solution shall be compatible with one of the following currently supported database technologies: Oracle, MySQL, or MS SQL.
- b) Offeror should provide technical documentation regarding configuration and installation including backup/maintenance scripts for proposed solution

A.1.4 Web Services

- a) Solution shall be compatible with CU's Web Server hosting requirements:
 - For linux-based systems:
 - Before 1/1/2015: Oracle Enterprise Linux 6.x.
 - After 1/1/2015: Oracle Enterprise Linux 7.x or above
 - For Windows-based systems:
 - Windows Server 2012 R2 or above.
- b) Please note the Oracle Enterprise Linux is a variant of RedHat Enterprise Linux (RHEL)

B.1.5 Security

- a) If the offeror's solution utilizes, processes, or otherwise stores data which is subject to any regulatory requirements, offeror must describe and provide documentation of processes and practices that support the necessary regulatory controls for applicable data elements.
- b) If the offeror's solution requires confidential, sensitive or otherwise protected data transmissions, solution shall utilize a secure, encrypted method of transport (e.g. Secure Socket Layer (TLS/SSL), VPN, etc.)
- c) Offeror shall describe in detail the retention of any user activity logs, and other system information (including but not limited to unauthorized login attempts, successful logins, event times, etc) of the proposed solution.
 - Upon Clemson University's request offeror shall provide timely review of any activity logs.
- d) Solution shall provide multiple (tiered) security levels within the application. (ex: RBAC, etc)
- e) Offerors should also include documentation of how the solution keeps Clemson University data secure and confidential.
- f) Customer (CU) will require an Annual review of SOC1 (SSAE16), SOC2 reports for all vendor hosted solutions
- g) Offerors shall describe and provide documentation of how data is maintained in backup, the extent/duration and method of backups, timely destruction of backups (automated and upon request), and destruction (purge) of all client data upon separation.
- h) Offeror must describe and document the level of access to client data by offeror's staff or affiliates, safeguards in place to prevent any unauthorized access by offeror's staff or affiliates, and any regular review of access rights, privileges and activity by offeror's staff.

C.1.6 Integration

- a) Authentication
- b) Solution shall support one of the following for end user authentication (not required for administrator access)
 - Shibboleth (required)
 - SAML2

- Active Directory authentication integration
- SHA-2 user/password hashing - any stored passwords must be encrypted
- b) API for provisioning - solution should support one of the following
 - REST (Preferred)
 - SOAP
 - NetIQ IDM driver
 - other HTTP based protocols

A.1.7 Configuration/Deployment Management

- a) SaltStack is the configuration/deployment management system used by Clemson University.
- b) If the offeror's personnel will install or configure a CU Hosted system, the offeror should provide SaltStack "states" to facilitate automated provisioning and configuration. If unable to provide the SaltStack "states", the offeror shall allow in the contract sufficient consulting hours to develop the appropriate Saltstack "states" in collaboration with Clemson personnel.

A.1.8 Network

- a) Offeror shall describe in detail what network access and bandwidth is required for proposed solution.
- b) Solution shall be IPV6 compliant

A.2 Disaster Recovery/Business Continuity

A.2.1 Vendor to provide documented DR plan that includes the following:

- a) DR Notification Process – Should a disaster occur that affects our end user experience, we need to understand the notification process that would occur from the vendor to CU.
- b) Redundancy and Recovery Capabilities – Description of the high level internal redundancy and recovery capabilities within the cloud datacenter.
- c) Backup and Recovery Process – Description of the process used for backup and recovery of our data in the event of a disaster.
- d) Recovery Testing – Description of the recovery testing process (when, where and what tools)

A.2.1 Vendor to provide a documented decommission process for the data housed in the cloud application. Describe the process for Clemson to collect usable data from the vendor in the event that we terminate the contract.

A.3 Physical

A.3.1 Vendor Hosted Solutions:

- a) Data may only be used in such a way as to accomplish the assigned task or as directed by Clemson University.
- b) Solution shall provide a mechanism for Clemson University to control user and system level access to all functions of the hosted system where

- 839 applicable. This access should include utilizing Clemson University's
840 [Shibboleth](#) implementation for user level access.
- 841 c) Solution shall provide a mechanism for Clemson University to monitor
842 accurately the system status including, but not limited to, the up/down
843 status of the hosted system.
- 844 d) Vendor shall not store any Clemson University data in a facility outside of
845 the United States.
- 846 e) Solution shall provide a mechanism to allow Clemson University to
847 receive data files for consumption by, but not limited to, the Clemson
848 University Data Warehouse. Vendor shall design this transfer in a way as
849 to allow it to be scheduled and fully automated as well as fully controlled
850 by Clemson University.
- 851 f) Vendor shall provide Clemson University a mechanism to review and
852 export security data from the hosted solution. This data should include, but
853 not be limited to, login history, record modifications, and user location
854 information
- 855 g) Customer (CU) will require an Annual review of SOC1 (SSA16) reports