



COMMONWEALTH OF VIRGINIA
STANDARD CONTRACT

Contract No. UCPJMU7442

This contract entered into this 27th day of April 2026, by Forum One Communications Corp., hereinafter called the "Contractor" and Commonwealth of Virginia, James Madison University called the "Purchasing Agency".

WITNESSETH that the Contractor and the Purchasing Agency, in consideration of the mutual covenants, promises and agreements herein contained, agree as follows:

SCOPE OF CONTRACT: The Contractor shall provide the services to the Purchasing Agency as set forth in the Contract Documents.

PERIOD OF PERFORMANCE: From May 1, 2026 through April 30, 2027 with four (4) one-year renewal options.

The contract documents shall consist of:

- (1) This signed form;
(2) The following portions of the Request for Proposal RFP SLD-1244 dated October 28, 2025
(a) The Statement of Needs,
(b) The General Terms and Conditions,
(c) The Special Terms and Conditions together with any negotiated modifications of those Special Conditions;
(d) Addendum No. One – November 10, 2025
(e) Addendum No. Two – November 13, 2025
(f) Addendum No. Three – November 20, 2025
(3) The Contractor's Proposal dated November 23, 2025 and the following negotiated modification to the Proposal, all of which documents are incorporated herein.
(a) Negotiations Summary, dated April 27, 2026
(b) Attachment A – Pricing Schedule

IN WITNESS WHEREOF, the parties have caused this Contract to be duly executed intending to be bound thereby.

CONTRACTOR:
By: [Signature]
(Signature)
Elisabeth Bradley
(Printed Name)

PURCHASING AGENCY:
By: [Signature]
(Signature)
Shanna L. Devers
(Printed Name)

Title: CEO

Title: Lead Commodity Contract Officer

**RFP # SLD-1244, Digital Strategy, Design, and  
Engagement Services  
Negotiation Summary for Forum One  
Communication**  
**April 27, 2026**

1. Parties agree that items within this Negotiation Summary modify RFP# SLD-1244 and the Contractor's response to RFP# SLD-1244 and that this Negotiation Summary takes precedence in conflict.
2. Contractor hereby rescinds confidentiality of its entire proposal dated December 3, 2025 and all subsequent negotiations with the exception of specific sections of the proposal that have been identified on the Proprietary/Confidential Information Form and mutually agreed upon by the University.
3. Contractor shall provide detailed project quotes (*number of hours to be worked, contracted hourly rates, deliverable(s) to be provided, timelines, total cost*) for the scope of work provided by the Purchasing Agency. The Purchasing Agency shall issue purchase orders in accordance with the project quote that shall authorize the Contractor to proceed with work. There shall be no work permitted under this contract without an agency issued purchase order. Any Purchasing Agency requested change(s) to the project scope of work that will institute a change in cost shall be addressed through an updated project quote and purchase change order; there shall be no increase to the project cost otherwise.
4. Contract pricing shall be in accordance with the hourly labor rates as shown in *Attachment A, Pricing Schedule*.
5. All labor rates/pricing shall remain unchanged for the duration of the contract. Price increases may be negotiated only at the time of renewal and shall be in accordance with the other services category of the CPI-W section of the Consumer Price Index.
6. The Purchasing Agency shall preapprove in writing all Contractor reimbursable travel associated with this Contract. Contractors billing for travel related expenses must invoice in accordance with the U. S. General Services Administration (*GSA*) for lodging, meals and incidental expenses at the time of travel, which can be referenced at:  
<http://www.jmu.edu/finprocedures/4000/4215mie.shtml>.  
  
Transportation for air travel and car rental will be paid at cost with Contractor providing a documented receipt to the University. Contractor shall book air travel and car rental to ensure expenses remain economical. Air fares shall be reimbursed for standard with no upgrades.
7. Contractor Invoicing:
  - a. Shall occur upon completion of work (*project progress invoicing is acceptable*).
  - b. Shall occur at the contracted hourly rate in quarter hour increments for the actual time that work was performed.
8. Purchasing Agency shall own the rights to all code, documentation, and deliverables provided by Contractor under this contract with the format and repository for delivery begin mutually agreed to.

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9. Contractor has disclosed all potential fees. Additional charges will not be accepted.
10. Contractor shall not require the University to sign additional order forms or agreements for work being done under this contract.
11. Contractor agrees that all exceptions taken within their initial response to RFP SLD-1244 that are not specifically addressed within this negotiation summary are null and void.
12. *Section VIII, U. "NONVISUAL ACCESS TO TECHNOLOGY"* of RFP SLD-1244 dated October 28, 2025 is hereby removed and replaced with the following:

**NONVISUAL ACCESS:** All information technology which, pursuant to this Contract, is purchased or upgraded by or for the use of any State agency or institution or political subdivision of the Commonwealth (the "Technology") shall comply with the following nonvisual access standards from the date of purchase or upgrade until the expiration of this Contract:

- (i) Effective, interactive control and use of the Technology shall be readily achievable by nonvisual means;
- (ii) The Technology equipped for nonvisual access shall be compatible with information technology used by other individuals with whom any blind or visually impaired user of the Technology interacts;
- (iii) Nonvisual access technology shall be integrated into any networks used to share communications among employees, program participants or the public; and
- (iv) The technology for nonvisual access shall have the capability of providing equivalent access by nonvisual means to telecommunications or other interconnected network services used by persons who are not blind or visually impaired.

Compliance with the foregoing nonvisual access standards shall not be required if the head of the using agency or designee, institution or political subdivision determines that (i) the Technology is not available with nonvisual access because the essential elements of the Technology are visual and (ii) nonvisual equivalence is not available.

Installation of hardware, software, or peripheral devices used for nonvisual access is not required when the Technology is being used exclusively by individuals who are not blind or visually impaired, but applications programs and underlying operating systems (including the format of the data) used for the manipulation and presentation of information shall permit the installation and effective use of nonvisual access software and peripheral devices.

If requested, Supplier must provide a detailed explanation of how compliance with the foregoing nonvisual access standards is achieved and a validation of concept demonstration.

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The requirements of this Paragraph shall be construed to achieve full compliance with the Information Technology Access Act, §§ 2.2-3500 through 2.2-3505 of the Code of Virginia.

13. The following language is hereby incorporated and made part of this contract:

**SECTION 508 COMPLIANCE:**

- a. **Compliance Requirement.** All information and communications technology (ICT) purchased or upgraded pursuant to this Contract for use by any covered entity of the Commonwealth shall comply with the Information Technology Access Act, §§ 2.2-3500 through § 2.2-3505 of the Code of Virginia.
- b. **Certification or Documentation.** For ICT delivered under this Contract that will be used by a covered entity of the Commonwealth or made available to the public, Supplier must certify that the ICT conforms with “accessibility,” as that term is defined in Virginia Code § 2.2-3501.

If the Supplier cannot certify full conformance of accessibility, the Supplier must provide:

- (i) Supplier-paid and completed Accessibility Conformance Report (as that term is defined in Virginia Code § 2.2-3501) indicating the level of conformance with accessibility for the ICT being procured; and
- (ii) a Supplier-paid and completed Vendor Accessibility Roadmap (as that term is defined in Virginia Code § 2.2-3501) documenting any areas of nonconformance and including a timeline for each nonconforming area's completion.

**No Waiver of Supplier Obligations.** Consistent with 28 C.F.R. § 35.201 and 36 C.F.R. Part 1194, Appendix A, § E202, the covered entity of the Commonwealth may, in its sole discretion, procure non-accessible ICT, if such procurement does not result in individuals with disabilities being denied the benefit of any program, service, or activity. This discretion does not waive Supplier’s obligations to comply with accessibility requirements and provide required certifications or documentation.

# Digital Strategy, Design, and Engagement Services

RFP # SLD-1244

December 3, 2025

**Susie Conwell-Cruz, Client Partner**  
[sconwell-cruz@forumone.com](mailto:sconwell-cruz@forumone.com)

This proposal includes proprietary information, which shall not be disclosed outside the proposal review process and shall not be duplicated, used, or disclosed – in whole or in part – for any purpose other than to evaluate this proposal. If, however, a contract is awarded to Forum One Communications in connection with the submission of this proposal and data, the client shall have the right to duplicate or use the data to the extent provided in the solicitation and resultant contract.

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# 1. RFP Cover Sheet and Addenda Acknowledgments

**Requirement.** V.B.1. Return RFP cover sheet and all addenda acknowledgements, if any, signed and filled out as required.

## ***REQUEST FOR PROPOSAL*** ***RFP# SLD-1244***

**Issue Date:** October 28, 2025  
**Title:** Digital Strategy, Design, and Engagement Services  
**Issuing Agency:** Commonwealth of Virginia  
James Madison University  
Procurement Services MSC 5720  
752 Ott Street, Wine Price Building  
First Floor, Suite 1023  
Harrisonburg, VA 22807

**Period of Contract: From Date of Award Through One Year (Renewable)**

**Sealed Proposals Will Be Received Until 2:00 PM on December 3, 2025 for Furnishing The Services Described Herein. (See Special Terms & Conditions “D. Late Proposals”)**

*SEALED PROPOSALS MAY BE MAILED, EXPRESS MAILED, SUBMITTED IN eVA, OR HAND DELIVERED DIRECTLY TO THE ISSUING AGENCY SHOWN ABOVE.*

All Inquiries For Information And Clarification Should Be Directed To: Shanna Devers, Lead Commodity Contract Officer, Procurement Services, [deverssl@jmu.edu](mailto:deverssl@jmu.edu); 540-568-3131; (Fax) 540-568-7935 not later than five business days before the proposal closing date.

**NOTE: THE SIGNED PROPOSAL AND ALL ATTACHMENTS SHALL BE RETURNED.**

In compliance with this Request for Proposal and to all the conditions imposed herein, the undersigned offers and agrees to furnish the goods/services in accordance with the attached signed proposal or as mutually agreed upon by subsequent negotiation.

Name and Address of Firm:

Forum One Communications Corp.  
2451 Crystal Drive, Ste #600  
Arlington, VA 22202

By:   
(Signature)

Name: Joniece Cranford  
(Please Print)

---

Date: 11/23/2025

Title: Contracts Director

Web Address: www.forumone.com

Phone: 703-894-4304

Email: jcranford@forumone.com

Fax #: 703-995-4937

ACKNOWLEDGE RECEIPT OF ADDENDUM: #1 JC #2 JC #3 JC #4 \_\_\_\_\_ #5 \_\_\_\_\_ (please initial)

SMALL, WOMAN OR MINORITY OWNED BUSINESS:

• YES; • NO; IF YES ⇒ ⇒ • SMALL; • WOMAN; • MINORITY ***IF MINORITY***: • AA; • HA; • AsA; • NW; • Micro

## 2. Plan and Methodology for Providing Goods/Services Described in Section IV.

**Requirement.** V.B.2. Plan and methodology for providing the goods/services as described in Section IV. Statement of Needs of this Request for Proposal.

### 2.1. Executive Summary

**Requirement.** IV.C.1. Provide an executive summary of your firm, including office locations, years in business, personnel information (e.g. number of employees, expertise, resumes) and services offered.

Forum One is pleased to submit our proposal to work with James Madison University's (JMU) I'm Determined Center (IMD) to enhance your digital strategy and create a more effective web presence. We are especially interested in continuing our long-term strategic partnership with JMU and IMD and in growing the impact of the I'm Determine Center for those who rely on your resources and other programs who wish to follow in JMU's footsteps.

The I'm Determined Center has successfully grown from nine pilot schools to 70+ Virginia school divisions and 30+ states. This success has partly been fueled through your accessible website with a strong customer experience. Your current website can continue to evolve to better serve your audiences — youth, families, and educators — and showcase self-determination as an accessible, interactive learning journey. Through an enhanced digital experience, IMD will directly impact students with disabilities developing self-determination skills — creating more "Aha Moments" (*Reference II*).

Our vision for your website is to build upon the strong foundation that already exists: creating guided user journeys, educational modules, better resource curation, and showcase audiences as heroes of their own story. We will build on the strong foundation that IMD and Forum One have built over the past six years (*Reference II*).

### Our Approach

Our approach to continue to build on the I'm Determined Center's strong digital presence is three-pronged:

- **Lead with an accessibility-first digital strategy.** We would introduce accessibility audit to ensure — at a minimum — compliance standards at a set cadence on the program. We can also propose a plan for how IMD can stay ahead of accessibility requirements through a set bucket of hours for remediation efforts, ensuring your content and the website is compliant with Section 508, Title II of the Americans with Disabilities Act, and Virginia's IT Access Act (*Reference IV*).
- **Ensure a user-centric design and content strategy.** While IMD develops itself to be

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known as a Center and thought leader in its space, we will ensure your content strategy is clear and purposeful — that it evolves with you. Our designers will continue to improve the user journeys on your site and be proactive in making sure that the website reaches all of your audiences (*Reference IV*).

- **Create and implement innovative and secure technical solutions.** Our technical team will continue to provide ongoing maintenance and support for your website to ensure — first and foremost — that your website is secure and stable. Beyond that, they will work with our Strategist and Creative team to implement innovative solutions to better serve your audiences (*Reference IV*).

## Why We're the Right Partner

Forum One brings full-service technical and strategic excellence, an expert team, and a proven record of success in delivering results for similar organizations to reach your goals for this project.

### Relevant Experience in Educational and Accessibility-focused Projects

Forum One brings significant experience supporting projects focused on education services. As your current partner supporting the program, we are proud to be working on the I'm Determined Center's 20th Anniversary campaign as well as providing maintenance and support for your current web presence. Beyond our work with IMD, we have worked with other educational and accessibility-focused projects, like (*Reference IV.C.1*):

- Since 2012, Educational Testing Service (ETS) has engaged Forum One to design and build more engaging, interactive reports to share the **NAEP (National Assessment of Educational Progress)** results. Since then, Forum One has completed multiple reports each year under the NAEP program, designing and building interactive reports to explore NAEP data at the national, state, and district levels. All reports are designed to be fully accessible, per Section 508 standards, and are responsively designed to the tablet level.
- Forum One partnered with **Easterseals New Hampshire (NH)** to define a future-ready strategy for their digital ecosystem, including opportunities for a new website, an employee intranet, and other digital platforms that could make the organization's work more efficient and impactful. We provided Easterseals NH with data-backed resources and recommendations, including for a distributed governance strategy, enhanced data visualization and dissemination, and more tailored content experiences for Easterseals NH's wide variety of audiences, including service recipients, job-seekers, and donors.
- In 2015, the **Texas Higher Education Coordinating Board (THECB)** adopted a plan that aims for 60 percent of all Texans ages 25-34 to earn a certificate or degree by 2030. To help support these efforts, the THECB brought on Forum One to create a streamlined, design-forward interactive online portal for users to access and explore higher education data.
- The **West Virginia Department of Education (WVDE)** oversees the education of more than 250,000 students in over 700 schools with 20,000 teachers. Forum One worked with WVDE

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to migrate their site from WordPress to Drupal 10 and redesign their content to deliver a modern, accessible, and future-ready digital presence with easier content updates, enhanced security, and a more user-friendly experience for stakeholders, students, parents, and educators.

- Forum One has been a digital partner to the **Truman Foundation** since 2012. In 2021-22, we led a redesign and upgrade from Drupal 7 to Drupal 9 of both the truman.gov website and the scholar application portal, focusing on improving the user experience and the application process for audiences and administrators.

### Our Team's Expertise

Our personnel, who are all familiar with IMD and the important work your team does, bring the required expertise to continue to deliver on this project. Our team features (*Reference IV.C.1*):

- **Jacky Graham, Project Manager:** Jacky brings over 10 years of project leadership and digital marketing experience. She has managed successful Drupal and WordPress upgrades and projects spanning UX design, website redesign, development, data, and strategic marketing. She is focused on delivering quality results and being efficient with the team's time and budget. She is a Certified ScrumMaster and is currently working on her Project Management Professional (PMP) certification.
- **Kendall Reonal, Solutions Architect:** Kendall has more than eight years of experience working with clients to develop all aspects of digital strategy and translate a project vision into a successful web solution.
- **Hannah Webster, Strategist:** Hannah brings 15+ years of experience working with clients to craft and implement successful digital initiatives, strategic communications projects, and organizational strategies. A Certified Scrum Master and CPACC-certified Accessibility Professional, she brings specialized experience and expertise in research, organizational change management, communications, and public relations, including outreach and content development.
- **Emily Tartanella, Visual Designer:** With more than 12 years of experience, Emily has delivered successful design projects spanning branding, website and interactive design, UX, illustration, and print design. She brings demonstrated success leading design teams and delivering full lifecycle website redesigns, branding initiatives, and multimedia campaigns for mission-driven organizations.
- **Avery Timmons, UX Designer:** Avery applies her experience in responsive web applications to support our team in delivering integrated solutions. She brings experience performing UX design, conducting audience research, creating user-centered designs, and more. She has helped clients including the National Rural Health Resource Center, Baltimore County, the California Health Care Foundation, the UK National Health Service, Fairfax County Public Schools, the Howard Hughes Medical Institute, and more.
- **Greg Bueno, Tech Lead:** With nearly 25 years of experience, Greg works with our support team to develop high-quality technical solutions that help clients get the most out of the latest open source technologies and continuously improve their digital properties. He applies

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his extensive experience developing a range of websites and applications in WordPress, Drupal, PHP, HTML, JavaScript, CSS, C# and more to build and optimize powerful, flexible technology solutions. He specializes in WordPress, including creating and maintaining custom themes.

- **Susie Conwell-Cruz, Client Partner:** A Project Management Professional (PMP)-certified client partner with 15 years of experience, Susie advises teams across user experience, technology, creative, strategy, analytics, and support projects to help clients reach their digital and communications goals with tailored and scalable solutions. She brings a record of success in client engagement, portfolio management, and project management, and she has a strong background supporting clients in the health and nonprofit sectors.

### Services Aligned to Your Needs

Forum One is a full service digital agency with in-house professionals ready to meet your every need. This includes support with the following services (*Reference IV.C.1*):

Service	Description
<b>Technology</b>	We have 25+ years of experience architecting and building integrated, user-centered, and accessible websites and applications with leading-edge open source tools and platforms like WordPress, Drupal, and emerging technologies.
<b>Creative &amp; Design</b>	We offer visual design, user experience design, and content strategy and development spanning responsive web design, video production and animation, multimedia collateral, and brand systems and messaging.
<b>Data</b>	We manage, visualize, and share data, creating striking and compelling maps, charts, infographics, and interactive data visualizations to uncover insights and trends.
<b>Analytics &amp; Business Intelligence</b>	We measure and analyze digital performance to make data-driven decisions to reach engagement goals – from entry-level analytics setup and custom reporting to advanced implementations and API integrations.
<b>Support</b>	Our dedicated team offers cloud hosting management, technical support, 24/7 security monitoring and response, staff training, and impact tracking services.
<b>Content &amp; Digital Strategy</b>	We create content and digital strategies that reach audiences. We support across all mediums to help an organization’s complete digital strategy – from planning to strategizing to implementation.

### Corporate Information

Forum One is a remote-first, employee-owned (ESOP) organization, with a headquarters office in

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Arlington, VA and a satellite office in Seattle, WA. We were incorporated in 1997 and established in 1996. We currently have 80 full time staff. Staff expertise and resumes are included in response to **3. Corporate Expertise and Personnel.** Our services offered are provided above (*Reference IV.C.1*).

## What Success Looks Like – Accomplishing Your Statement of Needs

Our vision for this engagement with JMU and the I'm Determined Center is for your website to continue to flourish through the implementation of a number of the future digital strategy, design, and engagement projects listed in the RFP (many of which arose in our joint roadmapping sessions), in addition to ongoing maintenance to keep your website, content, and design update, accessible, and secure. As your partner, Forum One will continue to be a reliable, innovative partner to IMD. We will work with you to ensure that your website is doing everything it can to help achieve your organizational goals. We will do this by maintaining your current site, providing ongoing enhancements, and bringing forward and implementing big, innovative ideas (*Reference IV.B*).

### Maintenance of current site

Ensuring that your website has a strong foundation is critical and the first step. We will ensure that WordPress is secure and up-to-date with the latest versions. We will also address all bugs or errors on the site that may occur over time, keeping the site in a functioning and usable state for visitors (*Reference IV.B*).

### Ongoing Enhancements

As you aim to better represent yourself as a 'Center', we will continue to keep the focus on the youth, without compromising on the needs of parents and students. We will achieve this through having clear project plans with activities and deliverables outlined. We will help IMD as you grow your reach and help other educators with resources or their own programs outside of Virginia. Through our detailed project planning and annual roadmapping sessions, as well as our strong digital strategy expertise, we will work with you to expand your reach to youth in Virginia – and help you serve as a model for similar programs in other states. We will build this reputation piece-by-piece – through thoughtful branding, smart content and content strategy, and more – to position the Center without losing the focus. Our experience working with other influential organizations like the Gates Foundation, the U.S. The Department of Education, and various other think tanks and associations, position us well to be this partner for IMD. Our proposed ongoing enhancements include (*Reference IV.B*):

- An *annual roadmap planning session* developed through an in-person workshop to plan out priorities for IMD's digital strategy and website for the year. This will give IMD predictability and the ability to plan for what's coming during the contract year.
- Additional creation and implementation of *flexible design components* that not only solve current problems, but allow you to capitalize on future opportunities.
- An *annual accessibility audit* and *dedicated hours each month* to remediate any findings of the audit. This will help ensure that your website, content, videos, and all other resources meet and exceed compliance standards.
- *Analytics reporting and dashboard* to allow for more informed decision making about

**Requirement.** IV.C.1. Provide an executive summary of your firm, including office locations, years in business, personnel information (e.g. number of employees, expertise, resumes) and services offered.

- enhancements and priorities on the website.

### **Big, Innovative Ideas**

Our experts stay on top of industry trends. For our clients, like IMD, this means that we are able to bring fresh perspectives and innovative ideas to our clients. A highlight of the I'm Determined Center's 20th Anniversary campaign that Forum One is currently working on is building tools to showcase youth using their self-determination skills. In our next year of working with you, we will build on this momentum by co-creating the next phase of the project, elevating the voices of the IMD heroes: youth, educators, and families. We will do this through implementing big, innovative ideas. Some of these proposed ideas, include (*Reference IV.B*):

- Exploring ways to increase engagement on the website and the IMD program through the use of *forms* for users to submit their stories and experiences. We could also incorporate *personalization* or a *wizard* on the website to personalize the user experience or walk users through curated resources. This would make it easier for educators, for example, to find content specific to their needs more easily. We would work with IMD to determine the best solution to increase engagement on the website, whether that is incorporating an AI chatbot or NLP search functionality or a map that users can interact with.
- Improving IMD's *AI Discoverability*. We will improve the site's content strategy to ensure that your resources are accessible where your audiences are looking for information, which is increasingly via AI tools like ChatGPT or Google Overview. We will work with you to improve your content to best be digested by AI, increasing IMD's reach and findability.

IMD needs a strong and experienced partner to help accomplish your Statement of Needs and help as you expand the IMD program. We will always present you with the best and more realistic options for achieving your objectives — considering any constraints and budget — and work with you to implement them. We are excited to have the chance to continue to work with you and look forward to meeting to discuss the approach we've outlined. Please reach out with any questions (*Reference IV.C.1*).

Sincerely,



**Susie Conwell-Cruz, Client Partner**  
[sconwell-cruz@forumone.com](mailto:sconwell-cruz@forumone.com)

## 2.2. Primary Point of Contact

**Requirement.** IV.C.2. Provide the resume and contact information of a primary point of contact for the University.

Suzanne “Susie” Conwell–Cruz is Forum One’s primary point of contact for the University. As our Client Partner, Susie’s role is to proactively guide the team in understanding and achieving your vision and goals and ensuring client satisfaction and a successful partnership. Susie can be reached by phone at 917-751-4035 or by email at [sconwell-cruz@forumone.com](mailto:sconwell-cruz@forumone.com). Her resume is included below (*Reference IV.C.2*).

### **Suzanne Conwell–Cruz, Client Partner**

#### **KEY QUALIFICATIONS**

Suzanne Conwell–Cruz, a strategic and compassionate client advocate and technologist, develops positive relationships and customized solutions that improve client satisfaction. She supports product implementation; triage, tracks, and resolves technical and operational issues; and negotiates between internal and external stakeholders to foster adoption and expand use of technology.

#### **EDUCATION**

- Advanced Finance and Management, Columbia University School of International and Public Affairs, New York, NY, 2016
- Bachelor of Arts, Wellesley College, Wellesley, MA, 2007

#### **CERTIFICATIONS**

- Project Management Professional (PMP) Certification, Project Management Institute (PMI)

#### **PROFESSIONAL EXPERIENCE**

##### **Forum One, Client Partner, Remote, Nov 2021 – Present**

*Previous Position: Senior Account Manager*

- Manage a portfolio of active projects and accounts, ensuring high-quality work, exceptional client satisfaction, and strong team performance.
- Advise clients on six key areas, including analytics, technology, user experience, creative, strategy and support.
- Serves as the project advisor and point of contact for issue escalation for the project team and client.
- Monitor detailed project schedules, status reports, and projections to keep clients informed.
- Ensure clear communication regarding scope and schedule between Forum One and clients.
- Conduct regular account reviews to ensure client and project goals are met and explore opportunities for new initiatives.
- **Project: I am Determined** – Client partner for WordPress design, development, and support for the I am Determined 20th Anniversary Campaign and I am Determined website.
- **Project: The Lundquist Institute** – Client Partner for WordPress redesign and migration from Drupal for a biomedical research organization.
- **Project: National Assessment of Educational Progress (NAEP)** – Client Partner for 2024 [Math](#), [Reading](#), and [Science](#) Nation’s Report Cards.

- **Project: Easterseals NH** – Account Manager for digital ecosystem strategic discovery project and subsequent multisite WordPress and intranet redesign. Worked with clients to conduct internal and external audience research, analytics and technology review, and platform integration audit. Provided comprehensive report and recommendations to client.
- **Project: National Rural Health Resource Center** – Account Manager for Drupal 9 website redesign and upgrade, including Salesforce and Tableau integrations. Concurrent management of brand refresh project.
- **Project: Zero to Three** – Account Manager for development of inaugural WordPress website for the National Early Care and Education Workforce Center.
- **Project: United Way's Emergency Food and Shelter Program** – Account Manager for digital ecosystem roadmap project, which includes strategic recommendations for the modernization of the client portal system and public facing website, as well as for the improved utilization of nearly 40 years of currently-siloed grant data.
- **Project: Howard Hughes Medical Institute (HHMI)** – Account manager for multiple initiatives dedicated to science education and educators, including the public launch of the HHMI Biointeractive Community platform and a digital hub for subsidiary Tangled Bank Studios' Wild Hope documentary series.
- **Project: UK National Health Service (NHS) Race and Health Observatory** – Account Manager for development of new React-based data portal that illustrates racial inequalities in health through bias-minimizing data visualizations to help drive action in policy and practice.
- **Project: The Kennedy Forum** – Account Manager for multisite consolidation and WordPress redesign project for an organization that seeks to improve the prevention and treatment of mental health and addiction through advancing systemic reforms in the U.S. healthcare system.

#### **MEDECISION, Technical Account Manager, Remote, Jan 2021 – Sep 2021**

- Served as Scrum master/team lead.
- Met with clients to understand priorities and mobilized a team of resources to address client needs and improve satisfaction.
- Managed operations, tickets/support, and projects, as well as client communications, meetings, and escalations.
- Triaged and tracked technical issues and developed innovative solutions.
- Developed strong client relationships, fostering increased satisfaction with the platform.
- Improved ticket resolution time, decreasing the need for escalation.
- Negotiated between internal and external stakeholders to ensure timely project delivery.

#### **MEDECISION, Client Implementation Manager, Remote, Dec 2018 – Jan 2021**

- Consulted with clients and managed relationships, assessing needs and providing strategic advice.
- Collaborated cross-functionally to address client needs and meet/exceed expectations.
- Managed customer-specific product requirements to align product management functions and software development cycles.
- Transitioned with GSI Health to Medecision, post-acquisition.
- Maintained strong support of the product and organization during and post-acquisition.
- Created training and onboarding material.
- Managed multiple high-value implementations and go lives.

#### **ARCADIA.IO, Implementation/Account Manager, Burlington, MA, Aug 2017 – Dec 2018**

- Managed concurrent technical projects for six clients.

- Led client engagement and project tasks for complex, multi-phase data aggregation implementations, including kickoff, scoping, application build, testing, go-live, and training.
- Developed and maintained detailed project plans and materials.
- Developed and maintained communications between internal and external stakeholders, including status reports, issue logs, and risk mitigations; managed stakeholder expectations.
- Served as the primary point of escalation and resolution for project issues during implementation and post-go-live.
- Managed multiple high-value implementations and go lives.
- Developed strong relationships with clients.

**Columbia University Medical Center, Project Manager, New York, NY, Jul 2014 – Aug 2017**

- Served as project manager to the CMO and Division of Cardiology, managing all Accountable Care Organization initiatives.
- Built databases to organize/track care management projects and outreach activities, and to avoid overlaps in care.
- Planned and executed workflow modifications across medical centers to address changes in healthcare, specifically ICD-10 preparation and implementation, HCC coding improvement, and CMS Quality Measure gap closure.
- Created quality-related communications to educate physicians on CMS requirements equating to measurable compliance and fine/revenue loss avoidance.
- Devised dataflow and downtime procedures for Cardiovascular Ultrasound Laboratory, performing 35,000+ annual echocardiogram studies from 6 clinical sites in NYC.
- Addressed and resolved issues affecting workflow to maintain high volume of clinical analysis.
- Created a performance tracking protocol to standardize workload across ultrasound technologists, resulting in more equitable distribution of work.

**Columbia University, Cardiac Valve Program, Administrative Coordinator, New York, NY, Apr 2010 – Jun 2014**

- Managed an echocardiology research lab at Columbia University.
- Improved office efficiency by overhauling previously unstandardized administrative structures, leading to more timely and organized billing, study result dissemination, and contract management.
- Created and maintained detailed databases to track study acquisition and interpretation for 5+ concurrent studies.
- Cultivated long-term relationships with international study sponsors, maintaining communication on 30 sites in 7+ countries and facilitating solutions to address concerns.
- Jumpstarted stagnating research study patient enrollment, increasing participation more than 50%.

**SKILLS**

- |   |                       |
|---|-----------------------|
| ● MS Office (Word, Excel, Outlook, Project, PowerPoint) | ● Project Management  |
| ● Jira  | ● Scrum Methodology   |
| ● Salesforce  | ● Consulting          |
| ● Business Strategy                                     | ● Customer Engagement |
| ● Account Management                                    | ● Team Leadership     |
|   | ● Training            |

- Cross-functional
- Collaboration

- Relationship Development



## 2.3. Subcontractors

**Requirement.** *IV.C.3. Specify any work that your firm subcontracts out and the names of the subcontractors.*

Forum One will not use subcontractors for any work on this contract (*Reference IV.C.3*).

## 2.4. Process to Request a Quote

**Requirement.** *IV.C.4. Contractors shall not proceed with work under a resulting contract without a University-issued purchase order. Describe the process the University would follow to request a project quote.*

To begin a new Project Quote, the IMD team or other JMU office/program notifies the Forum One team via email to the Client Partner of a specific need. The Client Partner and Solutions Architect collaborate with the IMD/JMU team to identify the goals, requirements, budget, and timeline constraints of the project. Once this information is gathered, Forum One shares a Project Quote and proposal that outlines the work to be done, expected budget, and timeline via email with the requesting team by the requested deadline. Where necessary, the IMD/JMU and Forum One teams will schedule a meeting to review the Project Quote to answer any questions and capture any feedback that may result in further iteration of the quote towards a shared understanding of the scope, timeline and budget (*Reference IV.C.4*).

This Project Quote can then be incorporated into the purchase order. During the development of the quote, our team may request meetings (via web conference or in-person) to discuss the requirements and uncover insights which our team needs to provide accurate estimates (*Reference IV.C.4*).

## 2.5. Process for Determining Time/Hours Needed for Project

**Requirement.** IV.C.5. Describe your firm’s process for determining the time/hours needed for a University project. Specify all information that will be provided on a project quote.

Our initial step will be to digest and understand any documentation, background information, and/or existing digital assets provided to us regarding the project. Forum One will lead the IMD/JMU team through a short discovery engagement designed to understand the project in general and the individual and more granular business and functional requirements (*Reference IV.C.5*).

Based on the gathered requirements, our team will then assess the effort level for implementing the requested changes or building the new feature based on our expertise and experience on similar engagements. We will utilize our unique and thorough familiarity with existing I’m Determined Center digital properties, our deep understanding of your goals and objectives, and our vast experience working with your team to inform and develop complete and accurate estimates. Finally, Forum One will deliver a succinct statement of work (SOW) outlining our understanding of the project, our solution and approach to meeting your requirements, our estimated level of effort in terms of hours and personnel, and any assumptions we made in the development of our estimate (*Reference IV.C.5*).

## 2.6. Determination of and Adherence to Project Timelines

**Requirement.** IV.C.6. Describe how project timelines will be determined and communicated to JMU clients. Describe your firm's process for adhering to timelines.

We assume that project requests will come in various sizes. Therefore, timelines will be developed and managed on a per project basis. With the delivery of our initial SOW in response to JMU's communicated needs and requirements, Forum One will include a high-level timeline to outline the breakdown of each phase of the project and the general length of time we believe each phase will take to complete (*Reference IV.C.6*).

Should Forum One be selected to move forward with the project, we will provide a more detailed timeline to IMD/JMU outlining the steps and tasks that are required to deliver the project, the dates on which we expect to complete those steps and tasks, and the points where JMU's input and review will be required. Forum One will work with JMU to determine the timeline format and delivery mechanism with which JMU feels most comfortable. We currently use IMD's Basecamp to communicate project timelines (*Reference IV.C.6*).

Once a timeline is set, we will utilize daily and weekly communications with JMU to track progress against the set steps and tasks to ensure our team and the JMU team is on track to execute the project according to the agreed upon timeline. This will include weekly email updates; ad hoc, weekly, or monthly check-in calls; and (on larger projects) daily standup meetings (*Reference IV.C.6*).

Through this approach to regular communication and documentation, when scope changes or unforeseen technical complexities arise, we will document impacts to the timeline and work with you to adjust schedules or reallocate resources to keep critical deliverables on track (*Reference IV.C.6*).

At Forum One, we value our ability to communicate and be transparent about our work, as we understand the keys to executing successful projects are maintaining a shared understanding of the status of the project, where current responsibilities exist, and plans to remove known blockers (*Reference IV.C.6*).

## 2.7. Customer Service Model

**Requirement.** IV.C.7. Describe your firm's customer service model.

Forum One is a customer service-focused agency. Our goal is not only to be fully responsive to all of your needs, but to anticipate what you will need in the future.

You will be assigned a team of experts who are dedicated to the relationship and to your success. Forum One was founded with the focus of serving mission-driven organizations like IMD. Our team is highly trained on all aspects of the work, including project management, front-end development, user experience design, visual design, technical planning, and implementation (*Reference IV.C.7*).

Forum One believes technology can supplement, but never replace, personal interaction with our customers. We currently have regularly scheduled check-ins with the IMD project team, as well as ad hoc calls as needed. Communications are currently managed via IMD's Basecamp instance. IMD always has the option of reaching us via email, phone, or the use of the portal for non-urgent issues. Forum One will respond to all requests within one business day. Your Client Partner, Susie, is also always available for any escalations (*Reference IV.C.7*).

Our view is that customer service is the most important part of our work. We train extensively on customer service, and we hire individuals with the ability to effectively interact with our clients and project teams. In addition, Forum One believes in proactive client satisfaction check-ins, and our CEO and COO conduct these periodically to gauge overall satisfaction and identify areas for improvement in our service (*Reference IV.C.7*).

### Customer Service Response Windows

Small tasks are typically completed within 1-3 days depending on complexity, the estimated time to complete the task, and client response to questions from the developer. Larger tasks will be scheduled for client review within 2-3 days of the request. For instance, if a request is made for a task that is estimated to take 8-10 hours to complete, Forum One will advise the client of the date that it will be ready for their review on the development site (*Reference IV.C.7*).

Critical tasks are completed within 24-48 hours. Forum One considers a task critical if it precludes the client from accessing the administration of their website, is a development issue that causes a site outage, or is a critical security vulnerability that requires immediate patching (*Reference IV.C.7*).

## 2.8. Compliance with Title II of the Americans with Disabilities Act and Virginia's IT Access Act

**Requirement.** *IV.C.8. JMU is required to comply with Title II of the Americans with Disabilities Act and Virginia's Information Technology Access Act. See <https://www.jmu.edu/accessibility/digital-accessibility/title-ii/index.shtml> for more information.*

Compliance with accessibility requirements, like Title II of the American with Disabilities Act (ADA) and Virginia's Information Technology Access Act (ITAA), is a priority for Forum One. Our approach and experience meeting and exceeding these compliance requirements is provided below (*Reference IV.C.8*).

### 2.8.a. Firm's ability to develop technology and applications that comply with Title II of the Americans with Disabilities Act and Virginia's Information Technology Access Act

**Requirement.** *IV.C.8.a, Describe your firm's ability to develop technology and applications that comply with Title II of the Americans with Disabilities Act and Virginia's Information Technology Access Act.*

Forum One understands the legal and ethical obligations outlined in Title II of the ADA and Virginia's ITAA. Title II requires that public entities ensure people with disabilities have equal access to programs, services, and activities, including digital content and web-based resources. Virginia's ITAA reinforces these requirements specifically for information technology procured or developed by state agencies, mandating that technology be accessible to individuals with disabilities unless doing so would create an undue burden (*Reference IV.C.8.a*).

For IMD, these requirements take on heightened significance. Your audience includes youth with disabilities who depend on accessible digital resources to develop self-determination skills. Compliance isn't just about meeting legal standards — it's about ensuring the tools designed to empower these students actually work for them (*Reference IV.C.8.a*).

Virginia's ITAA references Section 508 standards and requires that information technology provide equivalent access for people with disabilities. We ensure (*Reference IV.C.8.a*):

- Compatibility with assistive technologies, including screen readers, screen magnifiers, speech recognition software, alternative keyboards, and switch devices
- Keyboard accessibility for all functionality
- Appropriate use of ARIA (Accessible Rich Internet Applications) landmarks and roles
- Accessible forms with proper labels, error identification, and recovery mechanisms
- Accessible multimedia with synchronized captions and transcripts

Given IMD's focus on youth with disabilities, we will go beyond baseline compliance to consider the practical experiences of your specific audiences. Many students with neuromuscular conditions use alternative input devices, eye-gaze technology, or switch access. Educators and families may access

**Requirement.** *IV.C.8.a, Describe your firm’s ability to develop technology and applications that comply with Title II of the Americans with Disabilities Act and Virginia’s Information Technology Access Act.*

your resources in varied contexts—from mobile devices during IEP meetings to tablets in classrooms (*Reference IV.C.8.a*).

**How We Build Accessibility In (*Reference IV.C.8.a*):**

- **User Experience & Navigation:** We design clear, direct pathways to priority content with straightforward navigation that works intuitively for screen readers and keyboard controls.
- **Visual Design:** Color contrast follows WCAG standards at minimum, and we never rely solely on color to communicate information or site organization. Responsive layouts work across desktop, tablet, and mobile devices.
- **Content:** Plain language principles guide all text—headings, taxonomies, keywords, and calls to action. Multimedia content includes alt tags for images, captions for video and audio, and accessible PDFs and downloadable resources.
- **Development:** Our open source Gesso theme builds in accessibility optimizations from the start. We follow coding best practices to ensure assistive technologies successfully render and navigate the site, meeting WCAG 2.1 AA standards at minimum and confirming compliance with JMU throughout the project.
- **Quality Assurance:** Our QA team creates a testing plan referencing the accessibility standards we establish, testing all features and components with both automated tools and manual testing, including keyboard-only navigation.

Beyond compliance, we will help IMD improve the practical experiences your audiences have with your website. This may include (*Reference IV.C.8.a*):

- Conducting an accessibility audit of all videos and resources.
- Evaluating your brand for accessibility and recommending visual design enhancements.
- Developing front-end improvements that benefit users with diverse abilities.
- Creating audience-focused content strategies.
- Providing an Accessibility Guide for content teams that includes guidelines and best practices for maintaining accessibility as the site grows.
- Implementing built-in accessibility checks as a future enhancement.

**2.8.b. Firm’s experience developing applications that are accessible for all levels and types of disabilities**

**Requirement.** *IV.C.8.b, Describe your firm’s experience in developing applications that are accessible for all levels and types of disabilities.*

Forum One has launched hundreds of accessible websites for educational institutions and government agencies that comply with Section 508, WCAG 2.1, and Virginia’s ITAA. Our clients include Georgetown University, HHMI, Fairfax County Public Schools, Colorado WIC, the Smithsonian Institution, Frist Art Museum, and the National Assessment of Educational Progress (*Reference IV.C.8.b*).

**Requirement.** IV.C.8.b, Describe your firm’s experience in developing applications that are accessible for all levels and types of disabilities.

Accessibility isn't an afterthought for IMD, it's central to the mission. Youth with disabilities, their families, and educators depend on your resources being fully accessible. We embed accessibility into every phase of our process, from strategy through launch and beyond (*Reference IV.C.8.b*).

We tailor our accessibility strategy based on audience research and the specific needs of people with neuromuscular conditions and other disabilities. Many of your users rely on assistive and alternative communication technologies, including speech recognition tools, switch scanning, alternative keyboards and pointing devices, screen readers, and eye-gaze technologies. Our accessibility priorities will include (*Reference IV.C.8.b*):

- Full keyboard accessibility for switch and on-screen keyboard users
- Proper labeling and UX patterns that work seamlessly with speech-recognition tools
- Large hit areas for all interactive elements, avoiding click-or-drag-only actions
- No time-limited interactions that disadvantage users with motor control challenges
- Stable layouts and predictable navigation for eye-gaze and AAC technology compatibility

Forum One team members are recognized experts who advocate for accessible design in the open source community. We have delivered conference talks, developed interactive online trainings (like our Section 508 Refresh course), and pioneered the Gesso starter theme that built accessibility optimizations into Drupal 8's core foundation. We regularly conduct accessibility audits, perform manual and automated testing, remediate documents, and deliver accessibility training to client teams (*Reference IV.C.8.b*).

### PROVEN EXPERIENCE

When Forum One developed [nmaahc.si.edu](http://nmaahc.si.edu), we developed the site to meet or exceed then-current federal accessibility standards. Since launching, we have worked with the National Museum of African American History and Culture (NMAAHC) to ensure the site stays fully accessible. We provide accessibility reviews and quality assurance checks, including automated checks using SortSite and Siteimprove, manual checks with keyboard navigation and Siteimprove, and manual checks with screen readers, such as NVDA and Voiceover. For videos we create for the site, we ensure there are thorough audio descriptions included using a human voice rather than a computer-generated voice.

For IMD, this expertise ensures your site not only meets compliance requirements but genuinely serves all users, especially youth with disabilities working toward self-determination (*Reference IV.C.8.b*).

## 2.8.c. Examples of work demonstrating knowledge around accessibility standards

**Requirement.** IV.C.8.c. Provide examples of previous and/or current work demonstrating knowledge around accessibility standards.

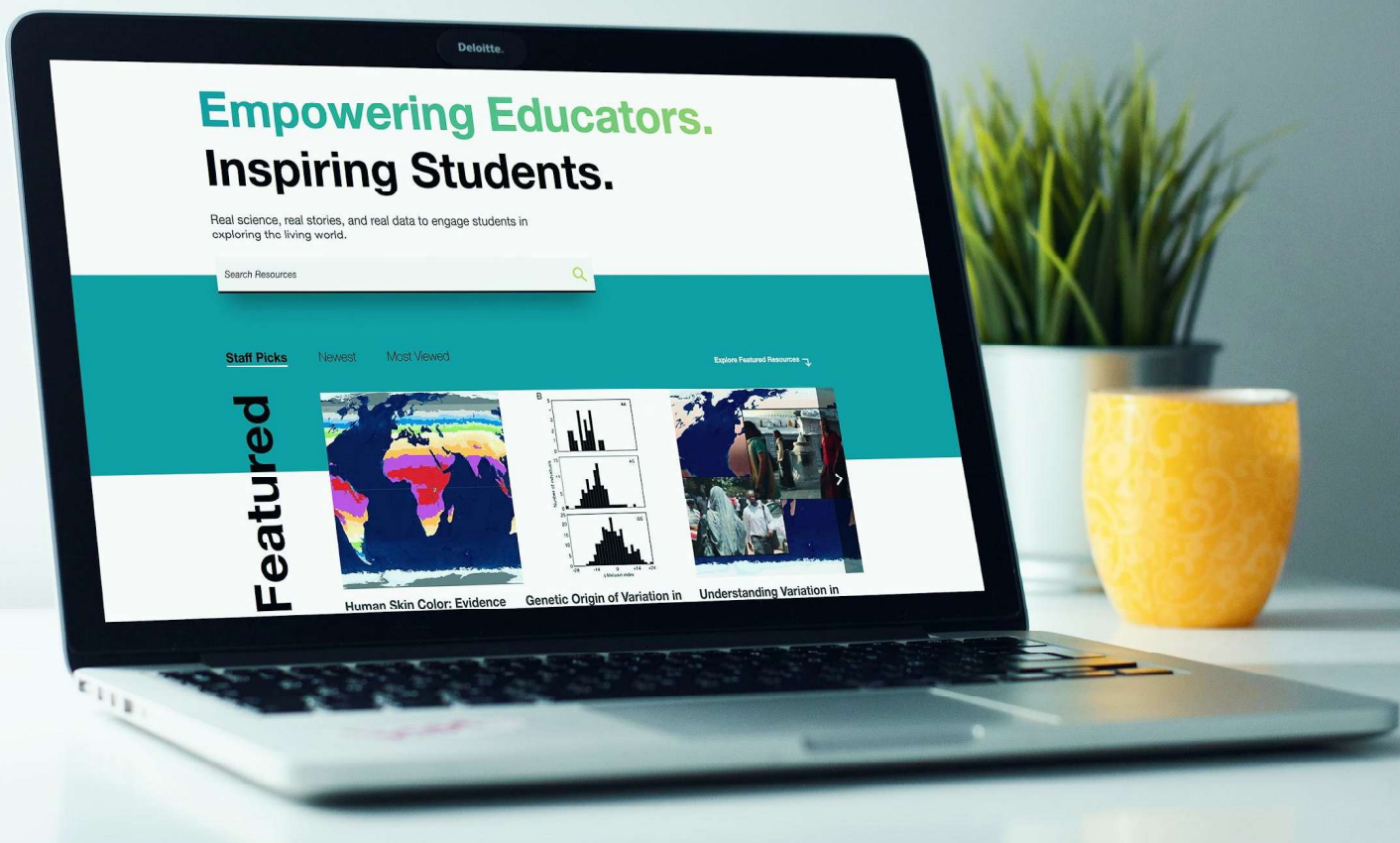
Accessibility is an integral part of every project Forum One delivers. Examples of our work demonstrating knowledge about meeting various accessibility standards, includes (Reference IV.C.8.c):

### Howard Hughes Medical Institute (HHMI) BioInteractive

#### Results Achieved

- ✓ Content Personalization with Drupal
- ✓ Flexible and Scalable Community-Building
- ✓ Accessibility

Forum One has partnered with HHMI BioInteractive since 2018 to build and expand a Drupal-based digital platform connecting 40,000 science educators worldwide with educational resources, interactive tools, lesson plans, workshops, videos, and news articles. The platform features robust search and filtering capabilities, personalized user accounts with favoriting and sharing functions, and customizable "playlists" with note-taking features. The HHMI team can curate thematic playlists and personalize experiences through integrated analytics (Reference IV.C.8.c).



**Requirement.** IV.C.8.c. Provide examples of previous and/or current work demonstrating knowledge around accessibility standards.

To meet Title II of the ADA requirements, the BioInteractive team implemented a comprehensive accessibility compliance program. Forum One developed a Standard Operating Procedure (SOP) to guide content remediation for existing materials and features while establishing accessibility protocols for new development work. The team prioritized remediation efforts based on user impact, working simultaneously on both fixing existing accessibility issues and ensuring new features met accessibility standards from the outset. This approach allowed them to track and measure accessibility compliance growth across multiple years while maintaining standards throughout ongoing platform development (*Reference IV.C.8.c*).

Under our remediation efforts, the BioInteractive website went from 67% accessible on automated testing scans in late 2023 to over 96% accessible on those same scans in 2025.

## Frist Art Museum

### Results Achieved

- ✓ Audience-Centered Redesign in WordPress
- ✓ Accessibility assessment
- ✓ Accessibility report

The Frist Art Museum in Nashville partnered with Forum One in 2020 to create a new WordPress website designed to exceed accessibility standards, not simply meet them. Accessibility was established as a top priority from the project's inception, with the goal of creating an inclusive digital presence that inspires cultural curiosity for all visitors (*Reference IV.C.8.c*).

After the site had been live for a year and a half, Forum One and the Frist conducted a comprehensive accessibility reassessment. The process began by identifying critical, easily addressable issues the Museum could fix independently. Forum One then performed an extensive accessibility audit using Accessibility Insights, conducting a full assessment of the homepage (including global header and footer elements) and FastPass reviews of selected pages. The team verified findings using multiple testing tools including NVDA screen reader, WAVE browser plugin, ANDI bookmarklet, Web Developer browser plugin, and Colour Contrast Analyser application (*Reference IV.C.8.c*).

The complete accessibility report documented methodology, test results, and detailed recommendations. Following the assessment, Forum One collaborated with the Museum to prioritize remediation work addressing identified issues. The partnership continues with ongoing support to maintain the Museum's high accessibility standards and guidance on emerging accessibility questions, ensuring the site remains compliant and inclusive over time (*Reference IV.C.8.c*).

**Requirement.** IV.C.8.c. Provide examples of previous and/or current work demonstrating knowledge around accessibility standards.

## Colorado Department of Public Health and Environment, Women, Infants, and Children (WIC)

### Results Achieved

- ✓ User-Centered Drupal Design and Development
- ✓ Accessibility assessment and remediation efforts to meet Colorado HB21-1110 law

Forum One partnered with Colorado's Department of Public Health and Environment (CDPHE) beginning in 2020 to redesign the WIC program website for better resource sharing and audience engagement. When Colorado passed HB21-1110 in 2021, requiring government entities to meet accessibility standards by July 1, 2024, CDPHE engaged Forum One to ensure compliance (*Reference IV.C.8.c*).

Forum One conducted a comprehensive accessibility audit beginning with a detailed project plan and schedule. The team utilized CDPHE's Siteimprove license to scan the entire website, then selected 15 high-traffic, representative pages for manual review. Manual testing included keyboard navigation and screen reader evaluations for conformance with WCAG 2.2 AA standards. The assessment resulted in a comprehensive document detailing identified issues and recommended fixes (*Reference IV.C.8.c*).

The consolidated accessibility report highlighted the site's accessibility strengths, provided a complete list of issues from both automated and manual testing, categorized severity and impact levels, and estimated fix complexity. Forum One led a triage and prioritization exercise with CDPHE to establish a remediation roadmap (*Reference IV.C.8.c*).

Following the assessment, Forum One executed remediation services addressing all identified issues, completing the work by the July 1, 2024 deadline. The team also drafted an accessibility statement for the website. To ensure long-term compliance, Forum One delivered staff training on creating accessible content and provided guidance on using Siteimprove for ongoing automated audits and reporting, empowering CDPHE to maintain accessibility standards independently (*Reference IV.C.8.c*).

## National Endowment for the Arts

### Results Achieved

- ✓ Accessibility assessment and content remediation for arts.gov using industry approved testing tools, like NVDA, WAVE, Accessibility Insights
- ✓ Drupal 9 Upgrade and Content Scalability

In April 2023, Forum One conducted a comprehensive accessibility audit of the National Endowment for the Arts (NEA) website, arts.gov, which they had originally designed and developed in 2020. While the site was built to meet all accessibility requirements and best practices at launch, the audit aimed to verify compliance with current WCAG 2.1 AA standards and identify any accessibility issues that emerged from three years of use and ongoing development (*Reference IV.C.8.c*).

**Requirement. IV.C.8.c.** Provide examples of previous and/or current work demonstrating knowledge around accessibility standards.

Forum One used Accessibility Insights to review approximately 23 pages, performing a full assessment of the homepage (including global header and footer elements) and FastPass reviews of selected pages. The team verified findings using multiple testing tools including NVDA screen reader, WAVE browser plugin, ANDI bookmarklet, Web Developer browser plugin, and Colour Contrast Analyser application. The comprehensive assessment resulted in a 16-page report with complete technical documentation (*Reference IV.C.8.c*).

The remediation process addressed 26 tickets, prioritizing high-impact fixes while creating a backlog for incremental improvements. Initial remediation work included making filter functionality fully keyboard-accessible, addressing global accessibility issues in the header, main menu, footer, and breadcrumbs, resolving report-identified issues, and conducting thorough retesting of all fixes. The team addressed lower-priority issues and audited additional pages (*Reference IV.C.8.c*).



## 2.9. Internal Efforts that Ensure Dedication to Accessibility Needs and Responsiveness

**Requirement.** *IV.C.9. Describe internal efforts that ensure dedication to accessibility needs and responsiveness to correct reported issues (e.g. personnel training and credentials, accessibility team, issue reporting mechanisms and treatment).*

As a Core Value of our identity and business model, Forum One proactively takes steps to ensure that we internally cultivate a culture that encourages learning about, improvement of, and best practices around accessibility needs. As an agency that creates custom digital products and solutions serving the general public, specific communities with higher levels of particular accessibility needs, and more, we find that our responsibility to be knowledgeable about and practical in the implementation of accessibility and responsiveness solutions even more imperative (*Reference IV.C.9*).

We build trust by actively seeking out new approaches and learning from others' points of view. Our team shares knowledge generously across projects and disciplines, creating a culture where accessibility expertise does not stay siloed within a single department. We provide our staff with the support, tools, and professional development opportunities needed to deepen their skills in accessible design and development. This investment in diverse expertise means IMD benefits from a team that brings varied perspectives to solving complex accessibility challenges – from understanding assistive technology users' needs to implementing technical solutions that work across devices and abilities. This is a part of every project we deliver, and we are currently ensuring our work meets accessibility needs on the IMD Anniversary website. We accomplish this through multiple channels(*Reference IV.C.9*):

- **Open communication channels for learning, engagement, and discussion:** We have a company-wide Slack channel (our internal communication tool) specific to accessibility topics. All staff are able to join this channel, and it is used to collaborate on accessibility solutions for projects and to share industry/subject matter expertise on the subject. We have established processes for reporting any issues and documenting mitigation and correction.
- **Certified staff and professional development budgets:** Forum One has staff who hold the Certified Professional in Accessibility Core Competencies (CPACC) certification from the IAAP. Our staff have access to a professional development budget annually to encourage further certifications and attendance at relevant industry events and conferences. Our in-house Quality Assurance team are experts at meeting accessibility standards.
- **Building accessibility into every stage of a project:** Accessibility acceptance criteria are standardized and added on Jira tickets during development so that our Quality Assurance team can test against those criteria at all appropriate steps. Front-end developers and Quality Assurance testers are engaged during the Design phase to verify our designs are accessible, providing a second layer of verification beyond our design team.

## 2.10. Documentation Offered

**Requirement.** IV.C.10. Describe the documentation offered for University projects.

For each new project, we will provide a tailored project plan, which will outline the specific deliverables and documentation that will be provided during that project. The following list of documentation includes documentation that is typically offered for each project, though additional documentation/deliverables could be added upon request or need (*Reference IV.C.10*):

- **Product Roadmap:** A document defining potential features, projects, tasks, and other items that may be executed to enhance the product. We propose doing a roadmap each year and that this could be paired with an in-person workshop.
- **Project Plan:** A document outlining the approach for project execution, including roles and responsibilities, timeline, and budget.
- **Product Requirements:** A document that defines how various features for a given product should operate.
- **Jira tickets:** Tickets that include notes on how features are implemented and tested.
- **Training Materials:** Recorded and/or written material showcasing how to manage an application.
- **Status Updates:** Routine reports that include details on task progress, budget, and timeline.
- **Design Files:** Digital files containing designs of application elements.
- **Content administration guide:** A document providing details and instructions for managing an application.
- **Code documentation:** Material that includes details on how to use and maintain a piece of software.

## 2.11. Support Provided During Implementation of New or Updated Applications

**Requirement.** *IV.C.11. Describe the support provided during the implementation of new or updated applications.*

Forum One provides hands-on support during the implementation of all new or updated applications to ensure a smooth transition and user adoption (*Reference IV.C.11*).

Before development is complete, Forum One works with clients to create a launch plan that includes key dates, roles, responsibilities, and potential launch blockers. Prior to launch, client teams will conduct user acceptance testing (UAT) in a staging or test environment to identify any issues. Any errors that would impact the launch are found are documented and addressed before deeming the application production-ready. We use a go/no-go checklist to ensure that all critical features and settings are in place and tested before going live (*Reference IV.C.11*).

When a major deployment or launch occurs, Forum One will be in constant communication with your team, keeping you updated on the status of all moving parts. This includes QA validation, performance monitoring, and verification of site analytics. If any issues arise, our team will work with you to address the highest-priority bugs (*Reference IV.C.11*).

During the implementation phase, we will also provide documentation, training, and other relevant artifacts to ensure that proper knowledge transfer occurs (*Reference IV.C.11*).

## 2.12. Corporate Examples

**Requirement.** IV.C.12. Provide examples of completed digital strategy, design, and engagement work to include:

### 2.12.a. Previous Experience with Special Education and/or Education Services

**Requirement.** IV.C.12.a. Previous project(s) related to special education and/or educational services.

Forum One is passionate about working with clients who make an impact and change the world for the better. This has allowed us to work with clients focused on education services and special education at all levels of government and with many notable non-profit organizations. Our experience includes (*Reference IV.C.12.a*):

- *Supporting organizations focused on disabilities and special education:* Forum One maintains ongoing partnerships with disability-focused organizations including the **I'm Determined Center** at James Madison University and **Easterseals New Hampshire**. Easterseals NH, the second-largest affiliate nationally, provides social services ensuring individuals with disabilities and special needs have equal opportunities to live, learn, work, and play in their communities. Forum One collaborated with Easterseals NH to develop a comprehensive digital ecosystem strategy, identifying opportunities for a new website, employee intranet, and additional digital platforms to enhance organizational efficiency and impact.
- *Supporting public sector education.* Forum One partners with **Fairfax County Public Schools** (FCPS), serving 183,000 students across 200 schools and centers and 40,000 employees through digital products that impact students, families, and faculty. Our work has included redesigning their website and employee intranet. Forum One also partnered with the **West Virginia Department of Education** on a website redesign, collaborating closely with educators to understand their needs and help the state increase teacher recruitment and job applications.
- *Working with educational resources and data providers.* Founded by policy experts, Forum One is committed to accessible educational resources and data. The firm has worked with organizations including the **National Assessment of Education Progress** (U.S. Department of Education), **HHMI BioInteractive**, **SEIU-UHW West & Joint Employer Education Fund**, **Texas Higher Education Coordinating Board**, and **Council for Advancement and Support of Education**. This work encompasses complex digital strategy engagements, website redesigns, and rebranding initiatives focused on improving access to educational programs, resources, and data.

## 2.12.b. Previous Experience with Higher Education

**Requirement.** *IV.C.12.b. Previous project(s) completed for higher education*

Forum One has proudly completed and actively supports projects for multiple higher education institutions. This includes projects for James Madison University, the University of Wisconsin, New York University, and Georgetown University (*Reference IV.C.12.b*):

- Since 2017, Forum One has worked with the **NYU Langone School of Public Health** to plan, design, and continually update and enhance the City Health Dashboard, which compares data on over 40 measures of public health across more than 900 U.S. cities. With powerful tools to explore and analyze the data, the City Health Dashboard is a one-stop resource for comprehensive, reliable, and actionable data to help America's cities build healthier and more equitable communities.
- The I'm Determined Center connects youth – especially those with disabilities – with self-determining educational opportunities and resources to help them succeed in school and life. Forum One worked with stakeholders from IMD and **James Madison University** (JMU) to reimagine and refresh the program's brand identity, and redesign and develop the website in WordPress to increase I'm Determined's reach and impact. We are currently supporting a web project for the 20th anniversary.
- County Health Rankings & Roadmaps, a collaboration between the **University of Wisconsin** Population Health Institute and the Robert Wood Johnson Foundation, is a definitive source for data to show how where people live affects their health. For the past 16 annual Rankings, Forum One has developed responsive, increasingly sophisticated data visualizations and maps that let users explore and compare detailed public health information across 65+ health factors and outcomes for more than 3,000 counties. Drupal 10 and JavaScript technologies power the Rankings site, with a Leaflet multi-layer on the front-end and a custom GIS server on the back-end to produce the beautiful map and data presentations. The site also features state-by-state summary reports, powerful comparison tools, and zoomable, pannable maps.
- Forum One has supported a number of projects at **Georgetown University** to extend the influence of its research and data to inform policymakers, changemakers, researchers, and general audiences alike. We have supported the Georgetown Institute for Women, Peace and Security, where we designed a WordPress website to let users explore its data, aggregated from multiple sources across 153 countries. We supported the Center for Security and Emerging Technology by developing a WordPress website to clearly explain its mission and surface timely journeys at the intersection of technology and security. And, we worked with the Beeck Center for Social Impact & Innovation to develop, implement, and support a comprehensive communications measurement, evaluation, and reporting strategy for their Digital Benefits Network.



## 2.12.c. Previous Experience with Front- and Back-end Applications and Unique Solutions

**Requirement.** *IV.C.12.c. Previous project(s) showing examples of front and back-end sides of applications and unique solutions.*

We bring over 25 years of experience developing custom front- and back-end applications and other unique solutions for our clients across the public and private sectors (*Reference IV.C.12.c*).

- Forum One partnered with **HHMI BioInteractive** to create a comprehensive digital hub connecting science educators worldwide with educational resources, interactive applications, lesson plans, workshops, videos, and articles designed to inspire student engagement with biology and the sciences. The platform features robust search and exploration capabilities allowing educators to discover multimedia resources across topics and formats, then assemble them into customized, shareable collections and lesson plans. Logged-in users can favorite and share resources, create custom "playlists" with note-taking functionality on individual items, and access HHMI-curated playlists and lesson plans organized around current themes and issues. The website includes collaborative features enabling users to join groups for project collaboration, document sharing, event creation, and discussion participation. Direct messaging facilitates private one-on-one or group conversations. A notifications portal with robust configuration preferences allows users to customize their experience, ensuring they stay informed about updates, messages, and activities most relevant to them. The platform empowers educators to personalize their engagement while the HHMI team can easily feature individual resources and create curated content.
- **Indy Parks** manages over 10,000 acres of parks, playgrounds, sports fields, trails, recreation centers, and nature centers, serving nearly 900,000 residents through over 2,000 annual programs. Forum One partnered with the City to design and develop a WordPress website that better connects residents and visitors with Indy Parks' experiences and services, increases engagement and learning, and improves the customer experience of accessing public services. The site's content structure centers key information—hours, locations, and entrance fees—on each park's detail page, making commonly requested information easier to find. This streamlined approach reduced customer service requests to Indy Parks staff and standardized how they communicate accurate, up-to-date information to the public. Forum One created the mobile-friendly WordPress site by migrating content from GraphCMS and integrating Salesforce Marketing Cloud, multilingual translation, single sign-on (SSO), and enhanced search capabilities through SearchWP. On the back-end, the team built a flexible component library using WordPress's full-site editor features, giving the Indy Parks team complete editorial control to seamlessly update content for events, seasonal activities, and job opportunities. Following launch, site visitors doubled each month during the first four months, supported by SEO optimization from Forum One's data analysts and content strategists.
- The **Smithsonian Office of Digital Transformation (ODT)** selected Forum One as its digital and strategic partner to develop, brand, and implement the Institution's first-ever multiple-museum exhibit initiative. "Kaleidoscope" is an online and in-person experience

**Requirement.** IV.C.12.c. Previous project(s) showing examples of front and back-end sides of applications and unique solutions.

exploring "resilience" from multiple perspectives, specifically targeting younger Millennials and older Gen Z audiences. Forum One reviewed existing audience research and conducted original research focused on this demographic, examining their media consumption habits, perceptions of the Smithsonian brand, and engagement approaches with similar institutions. Based on these insights, the team recommended a comprehensive omnichannel approach united by a cohesive brand identity spanning websites, social media, audio and video streaming, and physical activation experiences that explore generational resilience through stories and media from across the Smithsonian's collections and museums. Forum One designed the Kaleidoscope website aligned with the brand and visual identity system they created, collaborating closely with ODT to coordinate outreach across 17 Smithsonian units for this first-of-its-kind Institution-wide project. The team also supported a paid marketing campaign focused on Gen Z-popular platforms. In the first six months, the campaign reached over 3 million people from all 50 states across Facebook, Instagram, Spotify, YouTube, Hulu/Disney+, the campaign website, physical signage, and over 20 Smithsonian digital properties, advancing ODT's key goals of reaching younger audiences and expanding digital offerings.

- For the **Natural Resources Defense Council's** (NRDC) 50th anniversary, we designed and developed an immersive, longform [digital storytelling experience](#) illustrating NRDC's 50 years of environmental impact by taking audiences on a visually compelling, interactive journey through a series of key events that inspires contemporary audiences to act to protect the environment. We designed the feature to let audiences explore NRDC's impact stories in multiple ways, from experiencing the full chronological storyline with a smooth scrolling experience, or using the menu to jump to particular areas of the timeline. Throughout the design we used full-screen photography, bold typography, and delightful interactions and animations in scrolling and content loading to build the immersive experience. Our developers implemented the site in Drupal and optimized it to perform beautifully on mobile, delivering audiences an engaging, interactive, and seamless experience.
- In developing the City Health Dashboard for **New York University**, Forum One faced the challenge of unifying disparate data across 36 metrics with different units, directional interpretations of "good" versus "bad" results, and varying definitions of optimal outcomes. Additionally, data availability varied—some metrics were only available at the city level while others extended to Census tracts and demographic groups. Forum One created a visualization solution that served as a lowest common denominator, enabling audiences to clearly understand each metric against its full range and the national 500-city average. Each bar represents the complete range of scores for one metric, with a yellow line marking the selected city's value. A navy-blue triangle indicates the national 500-city average, allowing quick comparison of how an individual city performs relative to all other cities collectively. A gradient and checkmark establish which end of the scale represents "good" performance. This simple, unified structure allows audiences to view and interpret all metrics side-by-side despite their fundamental differences in measurement, scale, and directionality, making complex health data accessible and comparable across diverse communities.



## 2.13. Firm’s Experience Developing Customized Back-end Management Systems

**Requirement.** *IV.C.13. Describe your firm’s experience developing customized back-end management systems.*

Forum One has designed and worked with custom back-end management systems since our founding in 1996. From developing our own PHP-based CMS to working with PHP frameworks to develop custom back-end solutions, our team relies on the philosophy that we will develop the best possible solutions with available open source technology. Our team has a record of success applying these principles to help organizations like JMU, Oregon Metro, Indy Parks, the U.S. Environmental Protection Agency (EPA), U.S. Department of Interior, U.S. Fish and Wildlife Services, University of Georgetown, the ALS Association, March of Dimes, and many others (*Reference IV.C.13*).

## 2.14. Plan for Maintaining Open Communication During Project Work

**Requirement.** IV.C.14. Describe the plan for maintaining open communication during project work with the relevant university client.

Our management approach centers on close and active collaboration between Forum One and the IMD team. This ensures that we maintain open lines of communication during the project.

We use transparent communication channels and system-based management tools to handle ongoing project oversight, including a project management plan, an online workspace, and regular status updates and reporting. We keep you up to date on project progress with (*Reference IV.C.14*):

- **Clear and Efficient Team Structure:** You will have a dedicated Project Manager (PM), Jacky Grahm, who will serve as your day-to-day point of contact from our team. The key team also includes leads for strategy, user experience, design, and technical development who will guide the project. Our core team will lead activities in their respective areas and engage additional experts from our full-service team to deliver project tasks.
- **Frequent Reporting and Status Updates:** The PM will lead ad hoc, weekly, and monthly check-ins with project stakeholders to review tasks completed, potential risks, budget used, and upcoming tasks. We will deliver a bi-weekly status report with updates on budget, schedule, tasks completed, open tasks, and items awaiting feedback/approval.
- **Task Prioritization:** During our status meetings, our team will review the list of tasks that need to be completed and prioritize them for upcoming work. We will weigh the costs and benefits and review the upcoming backlog tasks to ensure we are completing all tasks in priority order – as directed by your staff, and guided by the expertise of the Forum One team.
- **Streamlined Online Project Collaboration:** We manage all documents and make them available for collaboration via a variety of simple, intuitive, and secure online tools, including Basecamp, Jira, Zoom and the Google suite of applications. We can also use your tools as opposed to our own for communication. Our joint workspace for the project teams will provide real-time access to project information including deliverables, requested feature lists, prototypes, and project status updates. Internally, we also use an online system to track task status and run quality assurance.
- **Clear Lines of Communication and Accountability:** Our PM serves as a central point of contact for your team, connecting you with Forum One’s resources and reporting progress. You can reach out to the PM at any time to ask questions, escalate issues, or get advice from our experts and senior leaders. Our PM also has support from a dedicated Client Partner, who tracks project health and meets regularly with Forum One’s Chief Operations Officer and CEO, providing direct lines of accountability and giving us a clear escalation path up to the executive level to resolve any issues.

## 2.15. Additional Services

**Requirement.** *IV.C.15. Describe any additional services that your firm can offer to the University. Specify additional costs and/or hourly rates in Section X, Pricing Schedule of this solicitation.*

JMU and IMD will benefit from working with Forum One because you have access to your dedicated project team, as well as Forum One's bench of in-house experts. This means that we are able to offer access — either through in-house staff or through pre-established partnerships — to nearly any service you may need to support your digital strategy, web, or marketing efforts. Below is a list of services that we provide in addition to our traditional digital strategy and web services. Labor rates for our staff who would provide these services are included in the Pricing Schedule. We are happy to include any of these services in future scopes with IMD and JMU, as requested (*Reference IV.C.15*).

### Strategy and Design (*Reference IV.C.15*)

- **AI Discoverability / Optimization:** With the prevalence of AI in search (like Google Overview), many organizations are losing site visits and relying on AI to find and share accurate content. Our team can work with JMU or IMD to help ensure that content is best optimized for AI search.
- **Personalization:** We can build personalization or a wizard into the site to aid in the customer experience for your different audiences.
- **MarTech Evaluation and Recommendations:** Our team can provide a comprehensive evaluation of your MarTech environment and provide recommendations and findings.
- **Analytics Reporting:** We can build comprehensive analytics dashboards and reports to help the JMU and/or IMD team better understand how your sites are used and how your resources and content are being received.
- **Enhanced Accessibility Services:** We can build in annual accessibility audits of your website, perform ongoing accessibility remediation, or establish dedicated hours to address any known accessibility issues.
- **User Testing:** Our staff are experts in user testing and usability testing, which helps our clients make data-informed decisions about future enhancements or changes to their website and digital content.
- **Communications and Messaging Support.** Our marketing and communications specialists can provide content strategy support to bolster your communications strategy and development.

### Technology (*Reference IV.C.15*)

- **Forms/Automation:** Our tech team can build forms into the website, automate any paper-based processes, and more. For example, we could build a form into the website for users to submit stories for the website or newsletter to increase engagement.
- **Hosting:** While we prefer clients to contract independently with hosting providers, we can provide a complete assessment of your hosting environment or providers and provide recommendations.
- **Consulting:** Our technologists provide consulting services to help clients evaluate their current environment, explore new technologies, and more.

## 2.16. Training Solutions

**Requirement.** IV.C.16. Describe your firm's ability to provide training sessions to educators for created applications. Indicate whether this training can be provided in-person and/or via webinar. Specify additional costs in Section X, Pricing Schedule of this solicitation.

- Content editor training both in person or recorded Zoom session
- Admin guide provided

Forum One can provide training to educators and your core team for any applications or digital solutions we create. Our training goes beyond basic how-to instructions. We equip your team to confidently operate, maintain, and evolve the site while building internal capacity for the future (*Reference IV.C.16*).

We offer flexible training formats to meet the needs of IMD staff (*Reference IV.C.16*):

- **In-Person Training:** Sessions accommodate up to six participants and are customized based on the specific application and your team's needs. Participants join together in one location, each with access to a computer. Before each session, we provide an agenda and any prerequisites. Training materials, including user guides and reference documentation, are delivered during or shortly after the session. With your permission, we record these sessions for future reference and to support onboarding of new team members.
- **Virtual Training:** We conduct web-based sessions via Zoom or JMU's preferred conferencing platform, using the same customized approach as in-person training. All participants need access to a computer and the ability to join the web conference. Sessions are recorded and provided to your team, creating an ongoing resource as staff changes or when refreshers are needed.

Our training philosophy centers on building sustainable capacity within your organization. We take a "train the trainer" approach, equipping your core team members to carry knowledge forward and support colleagues who join later. This is particularly valuable for IMD, where educators across Virginia and beyond will benefit from your team's ability to demonstrate tools and resources effectively (*Reference IV.C.16*).

Training materials are designed for clarity and ongoing reference, not just for the session itself. Documentation includes step-by-step guides, visual aids, troubleshooting tips, and best practices that teams can return to as questions arise (*Reference IV.C.16*).

Given IMD's mission and audience, accessibility training takes on special importance. We can provide specialized sessions on (*Reference IV.C.16*):

- Creating accessible content (alt text, document remediation, video captions)
- Using built-in accessibility features within the content management system
- Testing content for accessibility before publishing
- Understanding how assistive technology users experience your resources

This ensures educators and content creators understand not just how to use the tools, but why certain practices matter for students with disabilities (*Reference IV.C.16*).

**Requirement.** IV.C.16. Describe your firm’s ability to provide training sessions to educators for created applications. Indicate whether this training can be provided in-person and/or via webinar. Specify additional costs in Section X, Pricing Schedule of this solicitation.

- Content editor training both in person or recorded Zoom session
- Admin guide provided

Every training session is tailored to the specific application, your team's existing knowledge, and the priorities you identify. Whether you need focused sessions on content management, in-depth technical training for your web team, or educator-focused workshops on using IMD resources, we adapt our approach to support your goals (*Reference IV.C.16*).

## 2.17. Ability to Present Innovative Ideas for Application Updates/Creation

**Requirement.** IV.C.17. Describe your firm's ability to present innovative ideas for application updates/creation. Include details on branding strategy experience.

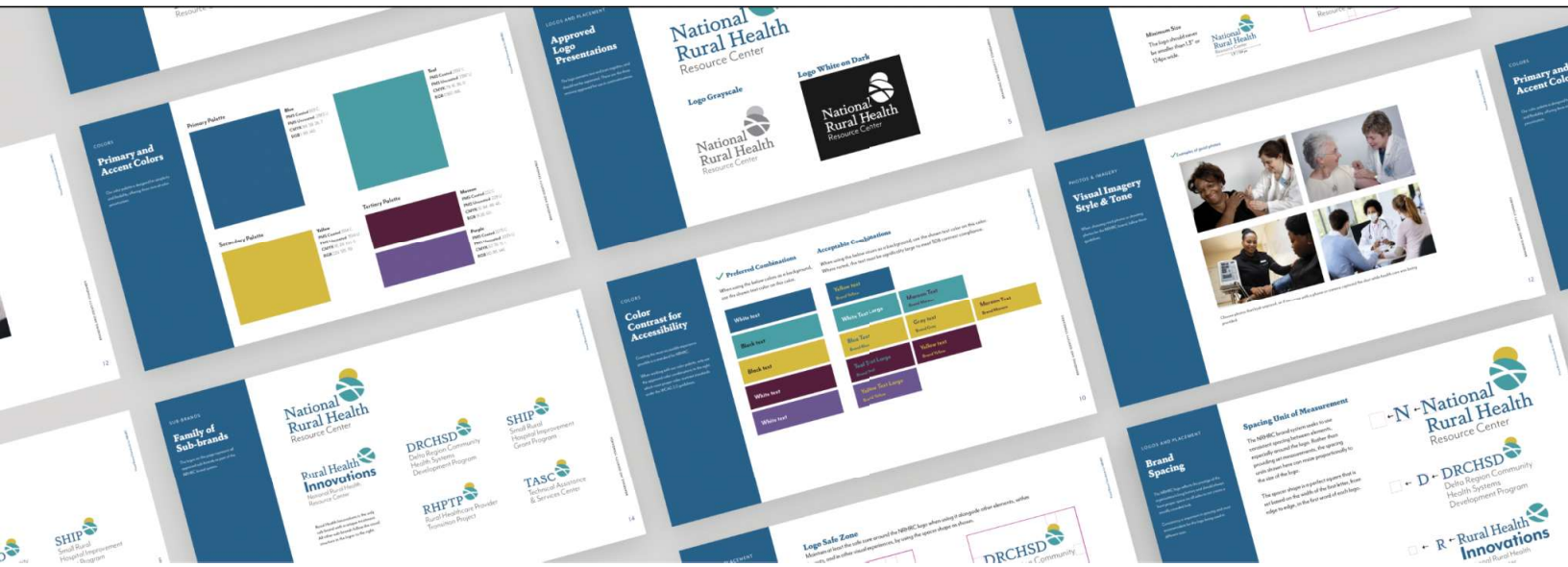
Forum One is committed to being a long-term strategic partner, continuously bringing innovative ideas to the I'm Determined project by leveraging emerging technologies, cross-sector best practices, and our deep understanding of your mission and audience (*Reference IV.C.17*).

As we have demonstrated in our project to create a web-first experience for the I'm Determined 20th Anniversary campaign, we are able to think beyond the designs that already exist, pulling from current digital trends and inspiration from similar organizations to produce an experience that is fresh. We designed new visual components that can be used beyond this celebration as blocks on the core I'm Determined website. We also identified new storytelling opportunities that had never been included in the I'm Determined website before, adding new ways for the site to serve its audiences (*Reference IV.C.17*).

We have also shown that we have foresight to put new digital trends in front of the I'm Determined team. We created a roadmap with potential projects, including an AI-based virtual assistant and support with AI discoverability due to changes we are seeing in the digital space (*Reference IV.C.17*).

We bring deep expertise in branding, including creating and managing brand guidelines that maintain consistency and integrity across all communications. Forum One has developed and implemented branding strategies for numerous clients, ensuring adherence to accessibility standards while creating visually compelling assets. This includes designing logos, templates, and other materials that make the consistent brand application easy. Additionally, we conduct training sessions to help teams implement branding guidelines effectively and ensure that all outputs reflect the brand's essence and goals. We have helped the following organizations with their brand strategy:

- Forum One worked with the **Appalachian Regional Commission** (ARC), a federal grant-making body with a mission to increase economic opportunity and parity in the region, to refresh its brand identity and design and develop a modern, user-friendly digital presence that serves as the go-to hub for research, data, grant opportunities, and resources to build partnerships and grow the region's success.
- Since 1985, the **National Rural Health Resource Center** has provided a range of services to improve rural healthcare, working closely with thousands of clinics, hospitals, health care professionals, health networks, and associations in all 50 states. Forum One worked with the Center to upgrade their website and refresh their branding in order to more effectively deliver their content and reach diverse audiences.



## 2.18. Escalation Process

**Requirement.** IV.C.18. Describe the escalation process that JMU will follow in the event that problems are discovered with application(s) after its launch. Describe how your firm would resolve problems within application(s) to ensure customer satisfaction (i.e. code issues, bugs, etc.). Provide an explanation of any costs that the University would incur in Section X, Pricing Schedule.

Ensuring that the applications we build and support are functional and meet the needs of your audiences is of utmost importance. Forum One maintains a Support practice and has developed an extremely efficient and responsive workflow for raising and accepting an issue, responding to the issue, and getting it resolved quickly and reliably within a set time interval (*Reference IV.C.18*).

Upon submission of the issue from the IMD team, we will confirm submission of the issue. Our team will quickly evaluate the provided issue, asking for clarification where needed. Upon evaluation and depending on the severity of the issue, our team will either work to resolve the issue immediately in high-priority situations or communicate a solution and effort level to IMD for a decision on how to move forward. Once a course of action is determined, our project manager will communicate a projected timeline and provide updates as the issue is resolved (*Reference IV.C.18*).

## 2.19. Service and Maintenance

**Requirement.** IV.C.19. Describe how your firm would propose to assist the University with service and maintenance of application(s).

Forum One provides technical support for modifications, improvements, bug fixes, and project management on a monthly basis. A key differentiator is that the Forum One team already has a high level of familiarity and expertise with your current platform. We would not require any transition-in activities, onboarding, or migration of knowledge or systems – we offer a seamless transition. For regular maintenance, support hours may be used for (*Reference IV.C.19*):

- Modifying existing content types, components, and functionality
- Fixing bugs and resolving technical issues
- Managing user permissions and troubleshooting access problems
- Adding new content views or templates
- Providing development oversight and code review for work completed by JMU staff
- Quality assurance and regression testing
- Implementing new features identified through user feedback
- Strategic consultation on accessibility improvements or content strategy

Response Time: We respond to all support tickets within one business day for non-urgent issues during regular business hours (Monday–Friday, 9am–6pm ET) (*Reference IV.C.19*).

Forum One provides proactive maintenance to ensure security updates and patches are applied promptly. Monthly maintenance includes (*Reference IV.C.19*):

- Review of available core and plugin/module updates
- Installation and testing of security patches in a development environment
- Quality assurance review to ensure updates don't disrupt existing functionality
- Deployment of approved updates to the live site, followed by final QA verification
- Documentation of all updates applied

This proactive approach keeps I'm Determined secure and up-to-date without requiring intervention from your team, allowing you to focus on your mission rather than technical maintenance (*Reference IV.C.19*).

We maintain all code in GitHub or your preferred repository system, providing version control and the ability to track changes over time. This ensures transparency, enables rollback if needed, and facilitates collaboration between Forum One and JMU technical staff (*Reference IV.C.19*).

Forum One brings industry-leading experience in open source development and a deep commitment to projects that advance social good. Our support team will staff the project with people who know your organization, your mission and understand key knowledge areas including education, accessibility, and self-determination. We will continue to work with I'm Determined as true partners with your team, not just vendors executing tasks (*Reference IV.C.19*).

## 2.20. Application Security Features for Data

**Requirement.** *IV.C.20. Describe the application security features for data.*

Forum One’s development approach follows best practices to ensure that all applications we build are secure. Our standards focus on proactive and preventative measures that we maintain throughout the entire development lifecycle (*Reference IV.C.20*).

At the core application level, such as in our codebase and the CMS, we enforce account safety. This includes configuring the systems to require complex passwords, multi-factor authentication, and/or single sign-on (SSO) (*Reference IV.C.20*).

We also configure user roles and permissions to provide access following the principle of least privilege, meaning that site users only have the access that is necessary for their tasks. This prevents having an overabundance of users with administrative privileges who can make damaging changes to the application (*Reference IV.C.20*).

In addition, we implement additional layers of security, such as the Wordfence plugin in WordPress. This allows us to further negate common threats and easily monitor and address irregular activity. We also regularly review any extensions or plugins for security updates, ensuring that they are applied immediately if deemed critical (*Reference IV.C.20*).

## 2.21. Approach to Test and Production Environments

**Requirement.** *IV.C.21. Describe your approach to test and production environments.*

Forum One generally maintains three development environments: Development, Test, and Production. Sometimes we may add additional environments depending on the content and staging requirements within each unique deployment model (*Reference IV.C.21*).

The **Development** environment is a sandbox utilized for initial quality assurance testing of code before being released to the Test environment. For this reason, this branch is not considered stable and is utilized strictly for internal testing (*Reference IV.C.21*).

The **Test** environment is considered a stable branch containing code that has already gone through the initial layer of quality assurance review according to the developed test criteria. This environment is used primarily for pre-release demonstration of functionality, client-side User Acceptance Testing (UAT), and approvals to launch (*Reference IV.C.21*).

The **Production** environment is what the live website or application utilizes to serve audiences. Only code and functionality that has passed through initial internal quality assurance on the Development environment and UAT and approval to release on the Test environment goes live into Production (*Reference IV.C.21*).

## 2.22. Hosting and Data Storage Services

**Requirement.** *IV.C.22. The University occasionally explores opportunities for hosting applications external to the university. Describe hosted and data storage services. Specify additional costs in Section X, Pricing Schedule.*

Forum One can provide highly reliable, secure, and scalable hosting and data storage support through our deep expertise with industry-leading hosting platforms (*Reference IV.C.22*).

Forum One is a long-standing partner and expert with Pantheon, specifically for hosting WordPress and Drupal websites. While Pantheon provides and maintains the hosting infrastructure, our team understands how to configure Pantheon's settings and our website codebases for optimal compatibility and scalability. In the event of a hosting incident, Forum One is able to work with Pantheon's team to address the issue and help ensure that downtime is minimized (*Reference IV.C.22*).

For data storage, Forum One builds sites to ensure that all application data is stored securely. If there are specific requirements for how data is stored or unique data policies that must be adhered to, Forum One can adjust the site infrastructure to be compliant (*Reference IV.C.22*).

Should you need additional technical consulting, we have a team of engineers who understand how to optimize sites for performance and security. We are able to provide recommendations and guidance for all aspects of your organization's technical infrastructure (*Reference IV.C.22*).

### 3. Corporate Expertise and Personnel

**Requirement.** V.B.3. A written narrative statement to include, but not be limited to, the expertise, qualifications, and experience of the firm and resumes of specific personnel to be assigned to perform the work.

Forum One brings IMD the corporate and personnel experience and expertise required to continue to grow the brand, web presence, and overall reputation of the I'm Determined Center. A description of our experience, qualifications, and expertise is provided below (*Reference V.B.3*).

#### Corporate Expertise, Qualifications, and Experience

Forum One is an impact-driven company that accelerates the progress of organizations solving the world's most significant problems by helping them thrive in a rapidly evolving world.

We are a team of more than 80 technical, creative, and strategic professionals, including top developers in the open source community, award-winning designers, and experts in understanding audience needs and crafting compelling digital communications. We serve clients all over the world with offices in Arlington, Virginia (HQ) and Seattle, Washington – plus remote staff across the U.S (*Reference V.B.3*).

Founded in 1996 by two policy experts, our team has achieved results on thousands of projects for more than 1,000 issue-focused organizations. We work with nonprofits, associations, foundations, research and educational institutions, cultural institutions, government agencies, and companies to understand their challenges and plan, deliver, and support forward-looking, effective solutions that achieve long-lasting impact (*Reference V.B.3*).

Forum One brings the necessary qualifications, experience, and expertise required to deliver on this project (*Reference V.B.3*):

- Widely recognized as a **leader in the open source community**, Forum One has launched hundreds of open source websites for influential organizations, including more than 100 **WordPress** sites and more than 400 Drupal sites in recent years. Our experts contribute core code and popular modules and plugins, and share their insights and experience at industry events and in publications. We have been developing WordPress sites for more than a decade across the public and private sector. Our developers have created our own, fully responsive SASS-based WordPress theme, and have contributed custom WordPress plugins and add-ons to enhance the platform's flexibility and user experience.
- Our **proposed team is low-risk** to IMD, with all staff members having previous experience supporting the IMD program. This reduces the need for a transition-in period. We are a known entity to the IMD team and look forward to bringing the same trusted level of support that we currently provide to future engagements.
- Our **staff are highly qualified** to deliver the work that IMD needs. We ensure that we have a highly certified team to deliver the highest quality outcomes to our clients. Our staff is certified in various relevant platforms and methodologies, including three PMP-certified staff,

**Requirement.** V.B.3. A written narrative statement to include, but not be limited to, the expertise, qualifications, and experience of the firm and resumes of specific personnel to be assigned to perform the work.

12 Certified ScrumMaster professionals, one Professional Scrum Master, six Pantheon WebOps Certifications, 33 Acquia developer certifications, five Platform.sh Certified Developers, and one AWS Certified Cloud Practitioner. As demonstrated below, our entire proposed team brings relevant experience and supports similar, relevant programs.

- We bring **experience with and knowledge about** education services. Our team has been a long time partner to educational institutions and programs with James Madison University, the U.S. Department of Education, the University of Wisconsin, New York University, James Madison University, Fairfax County Public Schools, and more. Through these programs, we have conducted user research and usability testing directly with many overlapping audiences and deeply understand your audience, their needs, and motivations. We will use this knowledge to inform our approach on the next iteration of our work together.

Our core services include (*Reference V.B.3*):

- **Digital Strategy and Transformation:** Our solutions span our clients' complete digital ecosystems, from their technical platforms and websites to their omnichannel communications via social media, email, events, and engagement campaigns.
- **Creative & Design:** We offer visual design, user experience design, and content strategy and development spanning responsive web design, video production and animation, multimedia collateral, and brand systems and messaging.
- **Technology:** We have 25+ years of experience architecting and building integrated, user-centered, and accessible websites and applications with leading-edge open source tools and platforms like WordPress, Drupal, and emerging technologies.
- **Data:** We manage, visualize, and share data, creating striking and compelling maps, charts, infographics, and interactive data visualizations to uncover insights and trends.
- **Analytics & Business Intelligence:** We measure and analyze digital performance to make data-driven decisions to reach engagement goals – from entry-level analytics setup and custom reporting to advanced implementations and API integrations.
- **Support:** Our dedicated team offers cloud hosting management, technical support, 24/7 security monitoring and response, staff training, and impact tracking services.
- **Content & Digital Strategy:** We create content and digital strategies that reach niche audiences. We provide support across all mediums to support an organization's complete digital strategy – from planning to strategizing to implementation.

## Personnel Experience and Resumes

Forum One is pleased to present IMD with an experienced team who is familiar with the IMD program. These personnel have experience supporting the program, and will be supplemented by additional Forum One staff, as required by specific projects (*Reference V.B.3*).

Staff, Role	Responsibility
Jacky Graham, Project Manager	Jacky will be responsible for meeting Forum One's service obligations with respect to cost, schedule, deliverables, scope, functionality, and quality. She will

	serve as your team’s primary point of contact and will provide ongoing updates on project progress to ensure the highest level of client satisfaction.
Kendall Reonal, Solutions Architect	Kendall will work with the project team to ensure our creative strategy and design work will set your team up for successful technical implementation. He will identify and recommend opportunities to optimize our work to produce a tailored, cost-effective, and user-friendly digital solution that achieves your objectives.
Hannah Webster, Strategist	Hannah will lead the team to conceptualize and deliver a results-driven, tailored solution that meets expectations and achieves your objectives on time and within budget. She will be responsible for your content and digital strategy solutions and implementation.
Emily Tartanella, Visual Designer	Emily will apply her extensive knowledge of design principles and best practices to create high-impact web designs and creative materials that engage your target audiences and create the best possible audience experience.
Avery Timmons, UX Designer	Avery will create an intuitive, user-friendly experience with your content. She will work with you to develop structural and design frameworks that meet the needs of your target users, and collaborate with our design and development teams to maximize the site’s ease of use and accessibility.
Greg Bueno, Tech Lead	Greg will apply coding best practices to create high functioning WordPress solutions, plugins, and components. He will work closely with the technical, design, and user experience leads to ensure the development of clean code and optimal solutions within the technical framework.
Susie Conwell-Cruz, Client Partner (Resume provided above)	Suzanne will ensure that the project team is properly supported and will handle any executive-level issue resolution. She will collaborate with the Scrum Master and the Agile project team to conceptualize and deliver a results-driven, strategic solution that meets expectations and achieves your objectives on time and within budget.

## Resumes

### Jacqueline “Jacky” Graham Senior Project Manager

#### EDUCATION

- Bachelor of Arts & Science in Journalism/Communications, University of Washington, Seattle, WA

#### CERTIFICATIONS

- Certified ScrumMaster, PMI, 2022
- Front End Development Certificate, General Assembly, 2023
- Digital Marketing Certificate, University of Washington Continued Learning
- Project Management Professional (PMP) – In Progress (expected December 2025)

#### PROFESSIONAL EXPERIENCE

##### **Forum One, Senior Project Manager, Seattle, WA, December 2019 – Present**

*Previous Positions: Project Manager, Support Project Coordinator*

- Develops and facilitates client meetings.
- Manages the schedule, scope, and budget of the project work.
- Tracks project process with internal and external teams.
- Simultaneously manages priorities across multiple projects and team members.
- Supports project team members in documentation, user research activities, prototyping, analytics, and quality assurance testing.
- Produces meeting summaries, small proposals, small reports and deliverables, and other written work in collaboration with Account Managers and the Director of Support Services.
- **Project: National Endowment for the Arts**
  - Manages Forum One's ongoing support work for the Endowment, including an upgrade to Drupal 10.
- **Project: Smithsonian National Museum of the American Indian (NMAI)**
  - Managed Forum One's project to provide ongoing Drupal web design and development support across various projects, including redesigning the NMAI homepage and COVID reopening page; redesigning and developing an event page to highlight Indigenous People Day; and delivering promotional event web pages and mid-size event portals.
  - Followed our Agile project management approach to meet periodically with NMAI stakeholders to review, coordinate, and prioritize tasks and projects.
  - Delivered special projects including pure HTML development to help client with development needs with tight schedules.
- **Project: Children's Hospital Colorado Foundation (CHCOF)**
  - Managed Forum One's project to complete last leg of redesign launch
  - Completed supplemental SEO strategy project with recommendations and general site improvements
  - Completed PHP 8.1 and Pantheon Migration
  - Reimagined menu functionality for both main site and courage classic site
  - Completed This Strategy Recommendations Report synthesizes the results of Forum One's discovery work with Children's Hospital Colorado Foundation. Forum One conducted an audience and content analysis to create a more effective, audience-centric experience for Donor Prospect Managers as well as site visitors like major donors themselves.
  - Ongoing maintenance support to keep site secured
  - Ongoing development needs
- **Project: California Health Care Foundation (CHCF)**
  - Managed Forum One's 2025 redesign and 2023 homepage refresh.
  - Directed development of supplemental image search, a behemoth task that includes a combined search page and an image search page.
  - Works with CHCF stakeholders to prioritize and deliver 40 hours of technical enhancement support each month.
- **Project: OHSU-WAAPCD: Washington Health Care Compare**
  - Leads Forum One's work with the Washington All-Payer Claims Database to reinvent the site structure to improve site navigation and content flow.
  - Led design and development of calculators for users to estimate health costs in Washington State.
  - Managed projects to improve site search feature and translation toggle.
  - Leading efforts to create special call-out boxes to point visitors to important



information.

- **Project: Frist Art Museum**
  - Manages Forum One's ongoing support and enhancements projects to deliver enhancements like updating gallery functionality, paid Google Ad campaigns, and improving site connectivity between content types.
- **Project: Northwest Energy Efficiency Alliance**
  - Manages ongoing support and enhancements.
  - Provided project management support for website redesign and migration from CraftCMS to WordPress.
- **Project: CHANGE SRHR Index (now Fòs Feminista)**
  - Manages Forum One's work with Fòs Feminista to design, develop, and update the Sexual and Reproductive Health and Rights (SRHR) Index website to evaluate and grade the annual impact of U.S. government policies, leadership, and health funding on global issues.
  - Delivered successful content management support; creation of a new homepage module and alert top bar to highlight key information; and creation of a new library page serving as an index and a press page.

### **Bigfin, Redmond, WA, November 2015 – October 2019**

*Digital Account Manager, September 2019 – October 2019*

- Administered, planned, and assigned all digital marketing and web development projects and requests for 60+ clients.
- Coordinated monthly marketing agenda's including social media campaigns, ads, and SEO best practices.
- Assisted development team with basic development updates featuring HTML, plugin updates, etc.
- Facilitated direct client interactions.
- Planned website launches.
- **Project: HoneyBucket**
  - Led design and development for site redesign.
- **Project: Pennys Salsa**
  - Led design and development for site redesign.
- **Project: Steve D. Smith Custom Homes**
  - Led social media campaign.
  - Responsible for monthly blog.

*Digital Marketing Coordinator, June 2018 – August 2019*

- Administer, plan, and assign all digital marketing and web development projects and requests for 60+ clients.
- Directly work with the CEO, SEO Manager, and development team to efficiently complete web design projects from design to launch.
- Collaborate with developers and designers to create digital assets.
- Assist development team by handling novice to intermediate level HTML edits in WordPress per client request.
- Serve as point of contact for all client requests, troubleshooting, and conference calls.
- Develop monthly search ranking reports for 20+ clients to monitor keyword and page rank, and result URLs.



*Digital Marketing Assistant, November 2015 – May 2018*

- Assisted marketing team with social media strategies by creating monthly social calendars for Bigfin and 10+ clients.
- Created, posted, and implemented monthly blogs for five local small businesses of various industries in WordPress.
- Support SEO Manager with SEO strategies including business listing creation and updating titles, meta-descriptions and editing website content for clients.

**MoPop Museum, Social Media/Production Intern, Seattle, WA, April 2015 – July 2015**

- Filmed, edited, and produced fan videos and promotional videos featured on MoPop’s website and social sites.
- Assisted Social Media Manager by creating Pinterest buttons to boost sales.
- Composed tweets for MoPop’s Twitter page for events including Capitol Hill Block Party, Star Wars Exhibit, Sound Off.

**SKILLS**

- Client Relationship Management
- Client Meetings
- Project Management
- Asana
- Slack
- BrightLocal Keyword Reporting
- Microsoft Office
- WordPress Management
- HTML
- Digital Marketing
- Social Media
- SEO
- Photoshop

**Hannah Webster**

**Position: Director of Strategic Communications**

**EDUCATION**

- Georgetown University, M.A. in Communication, Culture, and Technology, Washington, DC, 2010
- Loyola University, B.A. in English Literature, New Orleans, LA, 2006

**CERTIFICATION**

- Certified Professional in Accessibility Core Competency (CPACC), International Association of Accessibility Professionals, 2025
- Certified ScrumMaster®, Scrum Alliance, 2018

**PROFESSIONAL EXPERIENCE**

**Forum One, Director of Strategic Communications, Remote, March 2018 – Present**

*Previous Role: Account Manager – March 2018 – March 2020*

- Manages and provides senior leadership for strategic communications, content strategy



and design, and governance planning.

- As account manager, oversaw strategy and development engagements with new and existing clients.
- Consults on strategic communications, content design and ux writing, web accessibility, user engagement, organizational strategy, and governance for a variety of federal and state government and nonprofit clients.
- Contributes to business development initiatives, including strategy and content creation for responses to RFIs and RFPs.
- Provides training and best practices to clients and internal teams on best practices for writing for the web, web content accessibility, and SEO.
- Former DEIA Team Lead, responsible for internal Forum One communications related to Diversity, Equity and Inclusion.
- **Project: FHI 360 (formerly Family Health International)**
  - Strategic Lead and Account Manager for WordPress redesign and migration from Drupal.
  - Overhauled content structure.
- **Project: New York State Office of Parks, Recreation and Historic Preservation**
  - Provided content strategy for Drupal 10 redesign and migration from Microsoft .Net.
- **Project: U.S. General Services Administration: Web Metric Services and Usability for the GSA Office of Communications and Marketing**
  - Served as an Account Manager from 2018–2021, and continues to serve as the Principal Strategist.
  - Provides UX writing, governance planning, and other content strategy recommendations to support GSA’s efforts to ensure all content and user experiences on GSA.gov are data-informed and user-centered.
- **Project: Consumer Financial Protection Bureau (CFPB) Web Development, Design and Programming Support Services Blanket Purchase Agreement (BPA), sub to FHI**
  - Serves as account manager for Forum One’s work across multiple projects supporting CFPB’s digital products such as the [Teacher’s Digital Platform](#), providing strategic guidance and content strategy for ongoing improvements to the [consumerfinance.gov](#) website, and projects to provide visual design enhancements and graphic design services for infographics, reports, fliers, social media and digital graphics, and more.
- **Project: Smithsonian American Women's History Museum (SAWHM)**
  - Strategy Lead for SAWHM’s first digital exhibition, “Becoming Visible,” an immersive, multimedia storytelling experience.
  - Site developed in Vercel CMS within 2-month timeframe due to hard client due date of International Women's Day.
  - Exhibit covered in [The New York Times](#); launch event featured First Lady Jill Biden and “Wonder Woman” actress Lynda Carter.
- **Project: Consumer Financial Protection Bureau (CFPB)**
  - Account Manager for three separate contracts for Forum One with CFPB, including Project Management Support, Editorial Support, and User Experience.
- **Project: Howard Hughes Medical Institute (HHMI) BioInteractive**
  - Served as Account Manager for Forum One’s project to design and develop [biointeractive.org](#) in Drupal 8 to give science educators a modern and flexible resource library to plan their lessons and curate “playlists” of favorite items.
  - Served as Strategist for new consumer community portal and professional



- development platform.
  - Responsible for content strategy during the Discovery phase of the project.
  - Worked with the user experience team to research, survey, and plan governance meetings to develop recommendations and rollout site features and timelines.
- **Project: Centers for Disease Control and Prevention (CDC) Division of Nutrition, Physical Activity, and Obesity (DNPAO), sub to FHI**
  - Served as an Account Manager until 2021, and continues to serve as the Principal Strategist.
  - Analyzed and controlled content management support system to help with user research and content recommendations for DNPAO.
- **Project: Baltimore County**
  - Strategic Lead for migration of Baltimore County Government and Baltimore County Public Library websites from Site Executive/ColdFusion CMS to Drupal 10.
- **Project: West Virginia Department of Education**
  - Content Strategy Lead for Drupal 10 redesign and migration from WordPress.
- **Project: U.S. Department of Justice Freedom of Information Act (FOIA)**
  - Principal strategist providing content strategy and UX writing support during development of new AI/ML-driven search tool that aims to simplify the FOIA request process.
- **Project: Northwest Energy Efficiency Alliance (NEEA)**
  - Conducted workshops to prioritize governance, content, and process needs prior to website redesign and migration from CraftCMS to WordPress.
  - Wrote content templates to assist with content planning.
  - Provided strategic guidance for shaping the scope to ensure key client needs are met.
  - Supported user research efforts to evaluate top user tasks.
- **Project: Fairfax County Public Schools (FCPS)**
  - Provided governance support for Drupal 10 redesign and modernization of FCPS ecosystem of 200+ sites.

**The District Communications Group, Washington, DC, Sept. 2013 – Feb. 2018**

*Account Supervisor, Feb. 2016 – Feb. 2018*

*Senior Account Executive, Sept. 2014 – Feb. 2016*

*Account Executive, Sept. 2013 – Sept. 2014*

- Managed projects with \$15,000+ monthly budgets, including working with subcontractors and facilitating contract modifications.
- Oversaw a team of experienced web editors managing content updates for the most-trafficked website in the Department of Veterans Affairs (VA).
- Provided strategic communications and organizational change management support to facilitate messaging, branding and mission statement development around the large-scale merger of all VA digital health technologies.
- Provided user experience recommendations and content for the development of the VA Connected Care website.
- Developed framework and folder structure for VA Office of Connected Care SharePoint site.
- Conducted content audits on the VA Mobile Health and VA Telehealth Services websites to ensure consistency and accuracy of messaging/branding.
- Oversaw a team creating messaging, streamlining brand identity, conducting outreach and providing website user experience recommendations for online self-help courses for



veterans and military service members. Oversaw the development of research instruments and technical implementation of a series of virtual focus groups for VA Mental Health Services.

- Served as acting communications lead for the Office of Connected Care by providing daily communications support for Connected Care leadership.
- Reviewed and analyzed Spanish-language transcripts of ten focus groups conducted along the U.S.-Mexico border to assess reactions and feedback to communications materials designed to educate participants about the mosquito-transmitted diseases Chikungunya and Dengue Fever.
- Conducted a thorough content audit of all technical documentation related to base closure and realignment for the Department of Defense Office of Economic Adjustment.
- Experience developing technical and past performance components of proposals.

**Dynamics Research Corporation / High Performance Technologies, Inc. (HPTi), Washington, DC, Sept. 2010 – Sept. 2013**

*Research Analyst, Contract support for the Defense Centers of Excellence for Psychological Health and Traumatic Brain Injury (DcoE), Sept. 2012 – Sept. 2013*

- Oversaw graphics development and content edits for toolkits and fact sheets for clinical providers, including booklets of 100+ pages with complex graphical layout.
- Served as primary author and reviewer on key client products for both internal and external audiences, such as position papers, comprehensive literature reviews and environmental scans, online surveys, and measurement tools for quality metrics.

*Deputy Project Manager (Jan. 2012 – Sept. 2012) and Communications Analyst (Sept. 2010 – Jan. 2012), Contract support for Health Systems, Department of Veterans Affairs (VA)*

- Spearheaded the overhaul of the Health Systems 80+ page intranet site and worked with stakeholders to ensure content remained accurate, up-to-date and internally consistent with organizational messaging.
- Worked closely with workstream leads to oversee the redesign and content revision of all Health Systems communications materials for the six office portfolios during a rebranding effort and organizational name change.

**Federal Communications Commission, Office of Strategic Planning and Policy Analysis, Intern, Washington, DC, Sept. 2009 – Dec. 2009**

- Launched an internal, ongoing research project into the use and potential societal impact of parental Internet control technologies, child Internet safety, and the importance of new media education for both children and parents

**Law Offices of Charles E. Lavis Jr., Legal Assistant, New Orleans, LA, June 2006 – April 2008**

- Managed the client database of over 500 contacts for a small law practice dealing with insurance claims related to property loss during Hurricanes Katrina and Rita.
- Served as the primary point of contact for clients
- Drafted and edited written communications with clients, opposing counsel, insurance companies, and drafted discovery request documents when cases went to trial.

**SKILLS**

- Project management, account management
- Strategic planning

- UX writing, content design, governance planning, technical writing, content strategy, web content development, branding, messaging, accessibility and DEIA best practices
- Figma
- Canva
- Focus groups and user interviews
- Google Analytics
- GovDelivery
- CMS including WordPress, Liferay, and Wagtail
- Adobe Creative Suite
- Microsoft Office, SharePoint

## **VOLUNTEER EXPERIENCE**

- Active in church leadership at Church of the Pilgrims in DC, including organizing and coordinating the church’s participation in Capital Pride (1/2013–present)
- Served on the board for the Open Doors, the Washington D.C. chapter of More Light Presbyterians, which advocates for the full inclusion of LGBT people in ministry (8/2015–2/2017)
- Active in the Washington Interfaith Network (WIN), which advocates for green jobs and affordable housing in DC (2013–present)
- Coordinated the disaster relief response for Sierra Blanca Presbytery and the Synod of the Southwest in the Presbyterian Church USA (PCUSA) following Hurricane Katrina (9/2005–12/2005)

## **Kendall Reonal**

### Senior Solutions Architect

## **EDUCATION**

- **University of Washington Information School**, Candidate for Bachelor of Science in Informatics, Seattle, WA, Sept. 2013 – June 2017
  - **Project: Information School, Karavan – Informatics Capstone Project, Jan. 2017 – June 2017.** Created a mobile application called “Karavan” that aims to help more children walk to school safely. Conducted user research and interviews, created prototype, and handled user testing.
  - **Project: Business Impact Group, Student Consultant for Nonprofit Organization, Oct. 2016 – Dec. 2016.** Performed market research and analysis, including identifying primary and secondary target markets. Identified potential leverage points for the organization. Worked with team to craft recommendations and deliver to the client.
  - **Project: Information School, Systems Analysis for Nonprofit Organization (INFO 380 Information Systems), March 2016 – June 2016.** Performed planning and analysis for the client’s current system of processing and maintaining donor information. As project manager, revised documents and communicated with team members to meet deadlines.

## **PROFESSIONAL EXPERIENCE**

**Forum One**, Senior Solutions Architect, October 2017 – Present

*Previous Roles: Solutions Architect, Solutions Analyst, Support Analyst*

- Works with clients and internal project teams to develop and iterate on technical and strategic solutions to achieve organizational goals and objectives, and translate project visions into successful solutions.
- Specializes in business and technical requirements / planning, architecture, tool selection and implementation, process improvement and optimization, quality assurance, and staff training.
- Provides project management and oversight support across the full project lifecycle with clients and internal teams including project definition, implementation, iteration, delivery, evaluation, and continuous improvement.
- **Project: The Lundquist Institute**
  - Product Strategist for WordPress redesign and migration from Drupal for biomedical research organization.
  - Provided technical roadmapping and migration support.
- **Project: Easterseals NH**
  - Solutions architect for digital ecosystem strategic discovery project and subsequent multisite WordPress and intranet redesign.
  - Worked with client to conduct internal and external audience research, analytics and technology review, and platform integration audit.
  - Provided comprehensive report and recommendations to client.
  - Led strategy, research and discovery for development of staff intranet.
- **Project: Pacific Science Center (PacSci)**
  - Contributed to e-commerce integration architecture and organized complex client-business logic for WordPress site redesign ([pacificsciencecenter.org](https://pacificsciencecenter.org)).
- **Project: Zero to Three**
  - Solutions Architect and UX support for development of inaugural WordPress website of the Early Childhood Developmental Health Systems Resource Center, which seeks to improve the health and well-being of babies and toddlers in underserved communities.
  - Solutions Architect for inaugural WordPress website for the National Early Care and Education Workforce Center.
- **Project: Mercy Corps**
  - Acted as project manager to support the successful redesign and upgrade of their site into Drupal 8 ([mercy corps.org](https://mercy corps.org)).
- **Project: Gates Foundation**
  - Solutions architect for the Gates Level One WordPress site, [leveloneproject.org](https://leveloneproject.org) and liaised with the clients on technical tasks.
  - Solutions architect for WordPress redesign of the Foundation's Discovery Center museum website.
- **Project: Fairfax County Public Schools (FCPS)**
  - Solutions architect for Drupal 10 redesign and modernization of FCPS ecosystem of 200+ sites.
- **Project: U.S. Department of Justice Freedom of Information Act (FOIA)**
  - Part of solutions team for new AI/ML-driven search tool that aims to simplify the FOIA request process.
  - The tool is a decoupled web application, using Drupal for back-end and React/JS for front-end, connected via API. It is powered in part via API to the machine learning model.



- **Project: The Kennedy Forum**
  - Part of solutions team for multisite consolidation and WordPress redesign project for organization that seeks to improve the prevention and treatment of mental health and addiction through advancing systemic reforms in the U.S. healthcare system.

**Digital Media Academy**, Lead Instructor, Seattle, WA, July 2016 – Aug. 2017

- Taught students object oriented programming and game design
- Prepared and revised course curriculum to meet needs of students
- Constantly communicated with parents in order to get feedback for improvement of class

## **SKILLS**

- User Research
- User Testing
- SQL Database Design and Programming
- Python/Data Analytics
- Zapier Integration
- HTML, CSS, JavaScript (jQuery, Node.js)

**Emily Tartanella**

Position: Design Lead

## **Education**

- Post-Baccalaureate, Graphic Design, Maryland Institute College of Art, Baltimore, MD, 2017
- BA, English, Haverford College, Haverford, PA, 2010

## **Professional Experience**

**Forum One, Design Lead, Arlington, VA, September 2025 – Present**

- Applies human-centered design principles and best practices to create high-impact web designs and creative materials that engage target audiences.
- Designs user-focused, accessible, open source websites for clients.
- Applies advanced knowledge of layout, hierarchy, proportion, typography, color, imagery, usability, and web interaction to solve problems and realize client goals.
- Conceptualizes and designs next-generation interactive visual designs and brand assets, including websites, longform reports, templates, infographics, data visualizations, imagery, email newsletters, slideshows, social media assets, marketing collateral, and logos.
- Incorporates principles of graphic design, user experience, and information design to enhance the usability of websites, web content, print assets, and print content.
- Leads design team collaboration with user experience and technical teams to deliver integrated, user-focused solutions.
- Serves as a brand steward for clients, identifying and advising clients to build and maintain powerful brands.

**Maryland Institute College of Art, Instructor, Baltimore, MD, January 2025 – May 2025**

- Taught Transmedia Typography course to 16 MA Graphic Design students.
- Reviewed projects, secured guest speakers, and prepared lectures on typography.

## **Artemis Ward, Senior Art Director, Washington, D.C., August 2021 – May 2025**

- Led a dynamic team of graphic designers with specialties in branding, interactive design, UX, illustration, and report design.
- Oversaw creative from concept to execution, directing complex web builds, brand identities, and integrated campaigns.
- Art directed photo and video shoots and shaped digital experiences across platforms.
- Served as steward for internal company branding in conjunction with Creative Director.
- Clients included Microsoft, Meta, and Pew Charitable Trusts.
- **Project: Microsoft Global Sustainability Campaign**
  - Led design execution for Microsoft's global sustainability efforts over a multi-year initiative, aligning sustainability messaging across all internal channels.
  - Oversaw a wide range of creative outputs, including editorial reports, digital signage, environmental graphics, on-site photography, video production, and thousands of pieces of internal social collateral, to ensure that each piece reflected Microsoft's evolving goals and resonated with audiences worldwide.

## **openbox9, Art Director, Washington, D.C, September 2017 – August 2021**

*Previous Positions: Senior Designer, Multidisciplinary Designer*

- Served as project lead and head designer for multiple projects in both web and print.
- Emphasis in branding, illustration, and building relationships with clients.
- Extensive experience in taking websites from IA phase through to final launch.
- Clients included DC Scores, The University of Texas at Austin, and Stanford University.
- **Project: Folger Theater**
  - As Art Director, led creative direction across a landmark season that redefined the Folger Theater's visual voice, delivering standout campaigns and a fresh brand approach that helped drive record audience engagement.
  - Led the full creative process, from client relationships to execution.
  - Designed two of the season's three custom illustrations, developed expressive typographic treatments, and oversaw the visual rollout across print, digital, and social channels.
  - From 6-foot goalpost banners to complex social media campaigns, the work pushed the brand forward, bridging legacy with contemporary energy and helping the Folger connect with a broader, younger audience.
- **Project: National Wildlife Federation (NWF)**
  - Helped evolve the NWF brand during a period of rapid growth and transformation.
  - Led multi-disciplinary team that helped bring consistency and clarity to NWF's public presence across microsites, blog redesigns, physical signage, social campaigns, fundraising materials, and more than a dozen annual reports.
  - Adapted the creative strategy year over year to meet shifting goals, helping NWF communicate its mission with greater reach, relevance, and resonance.
- **Project: Community Solutions**
  - Led design of two websites: a storytelling-driven main site at [community.solutions](https://community.solutions) for donors and media, and a robust subsite with custom dashboards and tools used by 100+ communities working to end homelessness.
- **Project: DC Scores**
  - Led a full brand and web redesign for [dcscores.org](https://dcscores.org) to capture the scale, heart, and



- complexity of the organization's work, and engage donors, families, and partners.
- Led the website redesign from strategy through launch, partnering with developers, managing internal stakeholders, and shaping the visual identity.
- Provided web design, branding, illustration, strategy, and web development.
- **Project: University of Texas at Austin**
  - As Art Director, led a team in creating multiple concepts for the [Discovery to Impact](#) initiative's new website home, as well as a full brand refresh.
  - Designed and prototyped the chosen visual style, and guided production of a suite of social assets to help the Discovery to Impact brand grow.
  - Concepted and art directed a full scale, on-site video and photo shoot.
  - Designed and built the new site entirely in Webflow, moving efficiently to meet the client's needs.

**Ripe Studio, Graphic Design Apprentice, Washington, D.C., May 2017 – September 2017**

- Designed a wide range of pieces for a small DC branding studio.
- Served as project management on select studio projects.
- Managed studio newsletter and contributed to social media campaigns.

**Folger Shakespeare Library, Public Programs Administrative Assistant, Washington, D.C., June 2013 – July 2016**

- Drafted graphic content for marketing campaigns for all public programs.
- Managed web content for all Folger public programs and led departmental efforts in website redesign.
- Launched and maintained Folger Instagram account, and led social media campaigns for theater season.
- Assisted in drafting/editing marketing emails, creating written and graphic content.

**PopMatters, Music Staff Writer, Remote, April 2009 – May 2013**

- Reviewed new albums, contributed features, and reported on concerts and events.

**Teach for America, High School English Teacher, Warrenton, NC, Aug 2010 – May 2012**

- Educated over 100 students per year in English, in addition to designing and implementing original curricula, leading staff seminars, and securing over \$1,000 in grants and fundraising.

**Skills**

- Tools: Figma, Webflow, Adobe Creative Suite, Microsoft Office, CSS/HTML, After Effects
- Specialties: Branding, Illustration, Typography, UX Design
- Languages: Fluent in French, conversational in Italian

**Christin 'Avery' Timmons**

**Position: User Experience Designer**

**EDUCATION**

- Bachelor of Science in Neuroscience, Georgia Institute of Technology, Atlanta, GA, 2022

**PROFESSIONAL EXPERIENCE**

**Forum One, User Experience Designer, Remote, June 2022 – Present**

*Previous Position: User Experience Associate*

- Performs UX design, sketching, prototyping, and wireframing to create clean layouts, compelling designs, and intuitive interfaces that meet user needs.
- Conducts audience research, content strategy, and user experience design activities.
- Collaborates with the design and development teams to maximize the site's overall accessibility and ease of use.
- Leads clients through the creative process, from discovery and direction setting to user experience design and implementation.
- **Project: UK National Health Service (NHS) Race and Health Observatory**
  - UX Lead for development of new React-based data portal that illustrates racial inequalities in health through bias-minimizing data visualizations to help drive action in policy and practice.
- **Project: Smithsonian Office of Digital Transformation**
  - UX Lead for creation of a pan-institutional online and in-person experience exploring different interpretations of resilience intended for Millennial/Gen Z audiences.
- **Project: Smithsonian American Women's History Museum (SAWHM)**
  - UX Lead for SAWHM's first digital exhibition, "Becoming Visible," an immersive, multimedia storytelling experience.
  - Site developed in Vercel CMS within 2-month timeframe due to hard client due date of International Women's Day.
  - Exhibit covered in *The New York Times*; launch event featured First Lady Jill Biden and "Wonder Woman" actress Lynda Carter.
- **Project: Fairfax County Public Schools (FCPS)**
  - UX Lead for Drupal 10 redesign and modernization of FCPS ecosystem of 200+ sites.
  - Provided holistic cohesion among governance, content, UX, design, and development work.
- **Project: The Lundquist Institute**
  - UX Lead for WordPress redesign and migration from Drupal for biomedical research organization.
- **Project: Baltimore County**
  - Co-led UX design for migration of Baltimore County Government and Baltimore County Public Library websites from Site Executive/ColdFusion CMS to Drupal 10.
- **Project: Oregon Zoo**
  - Co-led UX for Drupal 9 redesign.
- **Project: Easterseals New Hampshire**
  - Co-led UX for multisite WordPress and intranet redesign for New Hampshire's largest nonprofit.
  - Conducted user testing and stakeholder workshops, drafted shared-structure sitemaps for four websites, and developed flexible wireframes and components.
- **Project: New York State Office of Parks, Recreation and Historic Preservation**
  - Provided UX design support for Drupal 10 redesign and migration from Microsoft .Net.
- **Project: Howard Hughes Medical Institute**
  - Provided UX design support for WordPress website and digital hub for subsidiary Tangled Bank Studios' Wild Hope conservation documentary series.
- **Project: Smithsonian Institution National Museum of American History**
  - Provided UX support for Drupal 9 redesign.
- **Project: Smithsonian National Museum of African American History and Culture**



- UX designer for ongoing enhancements and support.
- **Project: FHI 360 (formerly Family Health International)**
  - Created wireframes for WordPress redesign and migration from Drupal.
- **Project: Vilcek Foundation**
  - Created elevated animation and visual effects in Webflow.
- **Project: Gates Foundation Partner Organizational Effectiveness Resource Center**
  - Provided UX support for Decision Flow Tool prototype development.
- **Project: National Rural Health Resource Center**
  - Created and contributed to sitemap, content model, taxonomy, and wireframes as part of Drupal 7 to Drupal 9 website upgrade and redesign.
- **Project: Council for Advancement and Support of Education**
  - Provided UX design for:
    - Creation of new survey page and survey listing page.
    - Integration of CadmiumCD event platform.
- **Project: Virginia Department of Motor Vehicles (DMV)**
  - Provided UX support for Drupal 9 migration and redesign.
  - Translated designs from previous vendor into development-ready mockups.
- **Project: AARP Livability Index**
  - Provides ongoing strategic UX support for JavaScript-based AARP Livability Index.
  - Provided UX support for 2023 site refresh, which included adding a Community Finder tool, with a quiz and results page with over 50+ filterable metrics, and updating the design of the Index's gauges, color scheme, and top communities display.
- **Project: California Health Care Foundation**
  - UX Lead for WordPress redesign.
  - Supported theme refresh and new homepage design.
- **Project: Colorado Department of Public Health & Environment Women, Infants, and Children (WIC) Program**
  - For site refresh discovery, led workshops, wrote research test plans, collaborated on content and technical audits, ran moderated usability testing sessions, led analysis for both usability testing and card sorting, and presented a comprehensive summary with findings, opportunities, and sitemap recommendations.

#### **4.OS, UX/UI Designer, Junior, Remote, Jan 2022 – May 2022**

- Designed, developed, and maintained software for responsive web and mobile applications.
- Collaborated with product management to define and implement innovative solutions for the product direction.
- Conducted competitor and customer analysis.
- Created user flows, process flows and site maps to effectively communicate interaction and design ideas.
- Applied strategic, inspiring, and business-building approach to user experience designs while integrating user research and usability evaluation throughout.

#### **GT Housing and Resident Life, Resident Assistant, Atlanta, GA, March 2019 – May 2022**

- Designed, implemented, and evaluated education programs for up to 100 students
- Analyzed resident feedback and behavior then iterate to enhance existing user experience/program designs
- Created original graphic designs (e.g. digital images, sketches and tables) to market



- programs to residents
- Developed and adhered to branding/graphic standards on typography, color theory, images

## **RESEARCH & PROJECTS**

### **Work-Family-Health Lab at Georgia Tech, Undergraduate Research Assistant, Atlanta, GA**

January 2021 – Present

- Researched factors which impact workplace fatigue and recovery through human research.
- Conducted data analysis through a variety of qualitative and quantitative methods.
- Recruiting and screening participants, scheduling sessions and assisting with other planning.

### **Mental Health & Well-Being AI VIP, Undergraduate Research Assistant, Atlanta, GA, August 2020 – December 2020**

- Studied and developed machine learning code for sentiment analysis study on Reddit.com

## **LEADERSHIP & COMMUNITY INVOLVEMENT**

### **You Are More NonProfit Organization, Founder & President, Atlanta, GA, April 2020 – May 2021**

- Organized organization and developed a business plan with a nonprofit-based financial system.
- Coordinated, advertised, and executed multiple campaigns raising over \$2000 for mental health organizations.
- Worked with organizations to provide free counseling and other services for at-risk individuals.

## **SKILLS**

- Java
- Python
- Figma
- HTML
- CSS
- Adobe Illustrator
- Photoshop
- Invision
- Webflow
- Microsoft Office
- Canva
- Wireframing
- Data Analytics
- Interaction Design
- Usability Testing
- Storyboarding
- Information Architecture

## **OTHER (PUBLICATIONS, AWARDS, ETC.)**

- **Resident Assistant of the Year** – 2020, 2021
- **Dean's List** – Fall 2019, Spring 2020, Fall 2020, Spring 2021

**Greg Bueno**

Senior Developer

## **EDUCATION**

- **Austin Community College**, continuing education coursework in PERL, C#, and other languages, Austin, TX, 1999–2010
- **University of Hawai'i at Manoa**, Bachelor of Arts in Music and Journalism, Honolulu, HI, 1996

## **PROFESSIONAL EXPERIENCE**

## **Forum One**, Senior Developer, Seattle, WA, May 2018 – Present

- Supports all aspects of the development cycle, including coding, information architecture, and functional requirements definition.
- Serves as technical lead for open source development projects in WordPress, Drupal, and more.
- Develops themes, plugins, and custom features to meet client needs.
- Works with projects leads, designers, and technical architects to plan and design the technical components necessary to meet a client's front-end solutions requirements.
- Builds the front-end of client websites using PHP, CSS, HTML, C#.
- Codes applications and client-side interface features using JavaScript.
- **Project: Northwest Energy Efficiency Alliance**
  - Provides development support for WordPress (previously CraftCMS) site.
- **Project: James Madison University's I'm Determined, 06/2021 – Present**
  - Developed quiz feature to help site visitors find what they need more easily
  - Worked with the Block Variants plugin in the WordPress block editor and created a filter interface.
- **Project: National Association of Realtors, 08/2021 – Present**
  - Helped set up and launch annual C5 Summit conference site.
- **Project: Summer Health Professions Education Program, 12/2020 – Present**
  - Supports deployed releases for WordPress site.
  - Implemented new scholarship post type.
- **Project: California Health Care Foundation, 08/2020 – Present**
  - Provides development support for WordPress website.
- **Project: Frist Art Museum, 08/2020 – Present**
  - Provides development support for museum's WordPress website, implementing continuous design improvements.
- **Project: Elizabeth Glaser Pediatric AIDS Foundation, 01/2018 – Present**
  - Technical Lead for development support of WordPress website and retainer-based projects.
- **Project: Center for Climate and Energy Solutions (C2ES), 06/2021 – Present**
  - Technical Lead for ongoing support retainer for WordPress site.
  - Created new careers page that includes a custom shortcode integrating their HR platform.
- **Project: Fòs Feminista, 04/2020 – Present**
  - Back-end development for general support and periodic updating of Sexual and Reproductive Health and Rights (SRHR) Index, which grades the annual impact of U.S. government policies, leadership, and health funding on global issues.
  - **Technologies Used:** WordPress, JavaScript, GraphQL API
- **Project: Catalyst, 12/2018 – 02/2019**
  - Provided development support to redesign catalyst.org in WordPress to drive action to build more equitable workplaces for women. The site features a two-way integration between WordPress and Salesforce that allows Catalyst's supporting partner companies to access exclusive research and publications.
  - **Technologies Used:** WordPress Plugin API, Salesforce REST API
- **Project: Target ALS, 09/2018–10/2018; 12/2018**
  - Provided development to redesign targetals.org in WordPress to raise awareness of ALS research.
  - **Technologies Used:** WordPress, Pattern Lab



- **Project: American Oversight, 07/2018–8/2018; 2/2019–05/2019**
  - Provided development to relaunch American Oversight web site search with ElasticSearch. ElasticSearch indexes PDF content for greater searchability.
  - **Technologies Used:** WordPress Plugin API, ElasticSearch

**University of Washington**, Web Computing Specialist, Seattle, WA, Jan. 2012 – May 2018

- Created and maintained custom plugins and themes for WordPress–driven websites.
- Maintained C#/NET application to help researchers manage grants.

**Epicom Corp.**, Software Engineer, Austin, TX, July 2010 – Dec. 2011

- Customized SugarCRM to meet client needs. Projects included:
  - Building a customer portal for the Cases module using the REST API
  - Migrating data from other CRM systems to SugarCRM, e.g. Salesforce

**National Instruments**, Web Developer, Austin, TX, June 2003 – July 2010

- Developed web applications to:
  - Track localization of documentation
  - Maintain directories for software icons and procedural documentation
- Created scripts in PERL to convert documentation between FrameMaker, XML and HTML.

**Supportkids, Inc.**, Web Software Engineer, Austin, TX, Aug. 2000 – Aug. 2001

- Provided bridge between web development and content creation teams.
- Developed web–based online application for external customers with classic ASP (JScript).
- Developed and supported web–based interface for internal data entry.

## **SKILLS**

- PHP, MySQL, HTML, JavaScript, CSS, C#
- WordPress, Drupal, Laravel, CodeIgniter
- PHPStorm, Visual Studio, Git

## 4. Offeror Data Sheet

**Requirement.** *V.B.4. Offeror Data Sheet, included as Attachment A to this RFP.*

Forum One's Offeror Data Sheet, Attachment A, is included on the following page (*Reference V.B.4*).

ATTACHMENT A

OFFEROR DATA SHEET

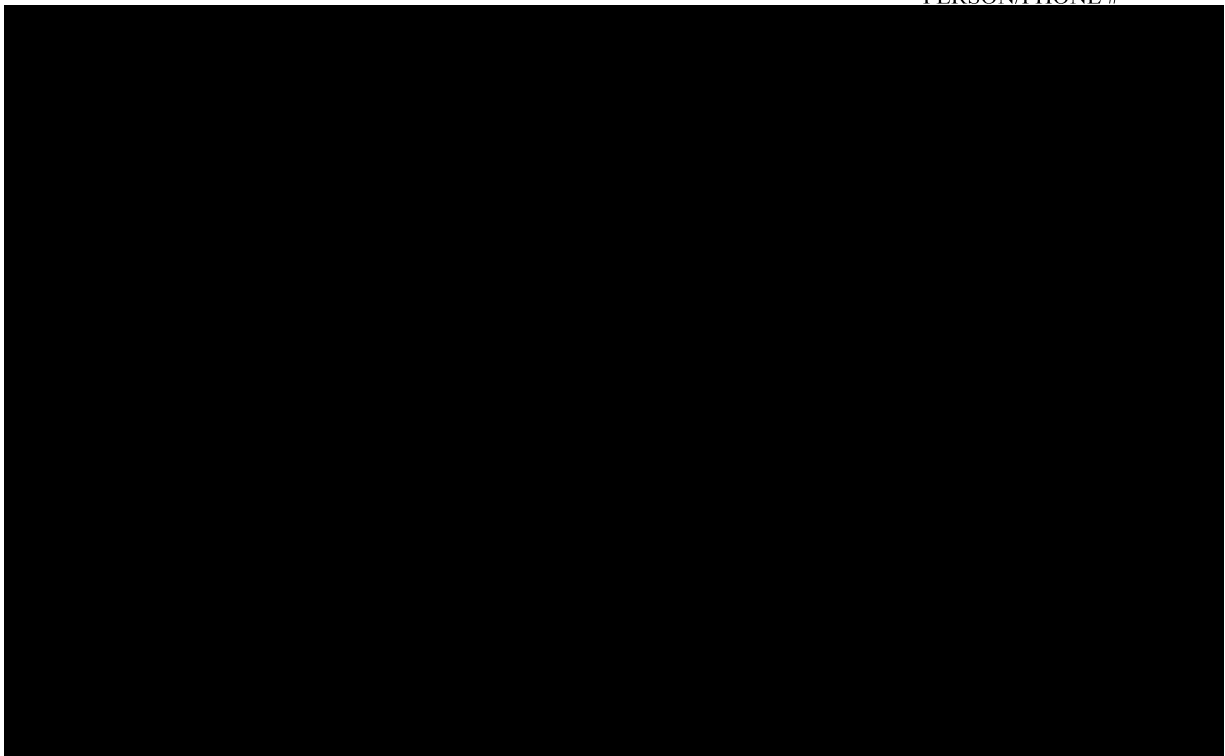
TO BE COMPLETED BY OFFEROR

- 1. **QUALIFICATIONS OF OFFEROR:** Offerors must have the capability and capacity in all respects to fully satisfy the contractual requirements.
- 2. **YEARS IN BUSINESS:** Indicate the length of time you have been in business providing these types of goods and services.

Years 28 Months 10

- 3. **REFERENCES:** Indicate below a listing of at least five (5) organizations, either commercial or governmental/educational, that your agency is servicing. Include the name and address of the person the purchasing agency has your permission to contact.

CLIENT	LENGTH OF SERVICE	ADDRESS	CONTACT PERSON/PHONE #
--------	-------------------	---------	------------------------



- 4. List full names and addresses of Offeror and any branch offices which may be responsible for administering the contract.

Forum One is a remote first organization with the following addresses associated:

2451 Crystal Drive Ste #600, Arlington, VA 22202

1601 5th Avenue, 9th Floor, Seattle, WA 98101

5. RELATIONSHIP WITH THE COMMONWEALTH OF VIRGINIA: Is any member of the firm an employee of the Commonwealth of Virginia who has a personal interest in this contract pursuant to the [CODE OF VIRGINIA](#), SECTION 2.2-3100 – 3131?

YES  NO

IF YES, EXPLAIN: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## 5. Small Business Subcontracting Plan

**Requirement.** 5. *Small Business Subcontracting Plan, included as Attachment B to this RFP. Offeror shall provide a Small Business Subcontracting plan which summarizes the planned utilization of Department of Small Business and Supplier Diversity (SBSD)-certified small businesses which include businesses owned by women and minorities, when they have received Department of Small Business and Supplier Diversity (SBSD) small business certification, under the contract to be awarded as a result of this solicitation. This is a requirement for all prime contracts in excess of \$100,000 unless no subcontracting opportunities exist.*

Forum One's Small Business Subcontracting Plan is included on the following pages. As a small business, Forum One does not anticipate using a subcontractor to perform this work. Should the use of a subcontractor become necessary, we will prioritize Virginia SWaM businesses (*Reference V.B.5*).

ATTACHMENT B

Small, Women and Minority-owned Businesses (SWaM) Utilization Plan

**Offeror Name:** Forum One Communications **Preparer Name:** Joniece Cranford

**Date:** 11/18/2025

Is your firm a **Small Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes X No       

If yes, certification number: 808473 Certification date: Valid through 8/19/29

Is your firm a **Woman-owned Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes        No X

If yes, certification number:        Certification date:       

Is your firm a **Minority-Owned Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes        No X

If yes, certification number:        Certification date:       

Is your firm a **Micro Business** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes        No X

If yes, certification number:        Certification date:       

**Instructions:** *Populate the table below to show your firm's plans for utilization of small, women-owned and minority-owned business enterprises in the performance of the contract. Describe plans to utilize SWAMs businesses as part of joint ventures, partnerships, subcontractors, suppliers, etc.*

**Small Business:** "Small business " means a business, independently owned or operated by one or more persons who are citizens of the United States or non-citizens who are in full compliance with United States immigration law, which, together with affiliates, has 250 or fewer employees, or average annual gross receipts of \$10 million or less averaged over the previous three years.

**Woman-Owned Business Enterprise:** A business concern which is at least 51 percent owned by one or more women who are U.S. citizens or legal resident aliens, or in the case of a corporation, partnership or limited liability company or other entity, at least 51 percent of the equity ownership interest in which is owned by one or more women, and whose management and daily business operations are controlled by one or more of such individuals. **For purposes of the SWAM Program, all certified women-owned businesses are also a small business enterprise.**

**Minority-Owned Business Enterprise:** A business concern which is at least 51 percent owned by one or more minorities or in the case of a corporation, partnership or limited liability company or other entity, at least 51 percent of the equity ownership interest in which is owned by one or more minorities and whose management and daily business operations are controlled by one or more of such individuals. **For purposes of the SWAM Program, all certified minority-owned businesses are also a small business enterprise.**

**Micro Business** is a certified Small Business under the SWaM Program and has no more than twenty-five (25) employees **AND** no more than \$3 million in average annual revenue over the three-year period prior to their certification.

**All small, women, and minority owned businesses must be certified by the Commonwealth of Virginia Department of Small Business and Supplier Diversity (SBSD) to be counted in the SWAM program. Certification applications are available through SBSDD at 800-223-0671 in Virginia, 804-786-6585 outside Virginia, or online at <http://www.sbsd.virginia.gov/> (Customer Service).**

***RETURN OF THIS PAGE IS REQUIRED***



**ATTACHMENT B (CNT'D)**  
**Small, Women and Minority-owned Businesses (SWaM) Utilization Plan**

Procurement Name and Number:     RFP# SLD-1244    

Date Form Completed: 11/30/2025

Listing of Sub-Contractors, to include, Small, Woman Owned and Minority Owned Businesses  
 for this Proposal and Subsequent Contract

Offeror / Proposer: Forum One Communications Firm      2451 Crystal Drive, Ste #600, Arlington, VA 22202      Joniece Cranford, jcranford@forumone.com  
 Address      Contact Person/No.

Sub-Contractor's Name and Address	Contact Person & Phone Number	SBSD Certification Number	Services or Materials Provided	Total Subcontractor Contract Amount (to include change orders)	Total Dollars Paid Subcontractor to date (to be submitted with request for payment from JMU)
-	-	-	-	-	-

*(Form shall be submitted with proposal and if awarded, a SWaM Sub-contractor Reporting Form shall be submitted to [swamreporting@jmu.edu](mailto:swamreporting@jmu.edu))*

**RETURN OF THIS PAGE IS REQUIRED**



## 6. Contracts with VACUPP Member Institutions

**Requirement.** *V.B.6. Identify the amount of sales your company had during the last twelve months with each VASCUPP Member Institution. A list of VASCUPP Members can be found at: [www.VASCUPP.org](http://www.VASCUPP.org).*

Forum One has only worked with James Madison University from the list of VASCUPP members. Our sales in the past 12 months (November 2024 – October 2025) is \$302,240.00 (Reference V.B.6).

# 7. Proposed Costs

**Requirement.** V.B.7. Proposed Cost. See Section X. Pricing Schedule of this Request for Proposal

## A. Labor Rates

Fees for services are calculated based on the rates below. These rates are valid for the duration of this Statement of Work. Project team members will bill their time at rates corresponding to their position from the list below, which may change during the course of the project. Forum One reserves the right to update labor rates for subsequent change orders and additional Statements of Work (Reference V.B.7).

### DELIVERY

Vice President: \$350  
Senior Account Director: \$325  
Account Director: \$275  
Senior Account Manager: \$250  
Account Manager: \$200  
Account Executive: \$200  
Project Director: \$240  
Senior Project Manager: \$195  
Project Manager: \$165  
Project Coordinator: \$145  
Quality Assurance Lead: \$190  
Quality Assurance Analyst: \$160  
Associate Quality Assurance Analyst: \$130

### PRODUCT

Product Director: \$275  
Product Lead: \$250  
Senior Product Strategist: \$230  
Product Strategist: \$210  
Product Analyst: \$165

### TECHNOLOGY

Vice President: \$350  
Technical Director: \$300  
Technical Architect II: \$275  
Technical Architect I: \$250  
Technical Engineer II: \$275  
Technical Engineer: \$250  
Senior Developer: \$220  
Developer: \$185  
Associate Developer: \$160  
Senior Front-end Developer: \$210  
Front-end Developer: \$185  
Associate Front-end Developer: \$160

IT Specialist: \$130  
Associate IT Specialist: \$100

### CREATIVE

Vice President: \$350  
Senior Design Director: \$275  
Design Director: \$250  
Creative Director: \$250  
Principal Designer: \$200  
Senior Designer: \$185  
Designer: \$165  
Associate Designer: \$145  
Principal User Experience Designer: \$220  
Senior User Experience Designer: \$200  
User Experience Designer: \$175  
Associate User Experience Designer: \$150

### STRATEGY

Vice President: \$350  
Strategy Director: \$275  
Strategy Lead: \$240  
Senior Strategist: \$210  
Strategist: \$180  
Associate Strategist: \$140  
Digital Producer: \$165  
Associate Digital Producer: \$135  
Copywriter: \$165  
Associate Copywriter: \$135

### DATA

Data and Analytics Director: \$275  
Data Lead: \$240  
Senior Data Analyst: \$200  
Data Analyst: \$180  
Associate Data Analyst: \$140

**Requirement.** V.B.7. Proposed Cost. See Section X. Pricing Schedule of this Request for Proposal

## B. Training Services

Training Type	Included Items	Est. Cost
<b>In-Person Training</b>	<ul style="list-style-type: none"><li>• Customized in-person training session</li><li>• Content administration guide and documentation</li><li>• Recording, if possible</li></ul>	\$3,000
<b>Virtual Training</b>	<ul style="list-style-type: none"><li>• Customized virtual training session</li><li>• Content administration guide and documentation</li><li>• Recording, if possible</li></ul>	\$3,000

## C. Hosting and Data Storage Services

Item	Est. Cost
<b>Hosting</b>	TBD based on hosting provider
<b>Hosting and Data Storage consulting</b>	\$250 per hour

## D. Incidentals, Travel, and Miscellaneous Fees

Please be advised that all travel will be billed at cost. Forum One will confirm travel costs prior to scheduling in-person meetings (*Reference V.B.7*).



# Request for Proposal

## RFP# SLD-1244

**Digital Strategy, Design, and Engagement  
Services**

**October 28, 2025**



**REQUEST FOR PROPOSAL**  
**RFP# SLD-1244**

**Issue Date:** October 28, 2025  
**Title:** Digital Strategy, Design, and Engagement Services  
**Issuing Agency:** Commonwealth of Virginia  
James Madison University  
Procurement Services MSC 5720  
752 Ott Street, Wine Price Building  
First Floor, Suite 1023  
Harrisonburg, VA 22807

**Period of Contract: From Date of Award Through One Year (Renewable)**

**Sealed Proposals Will Be Received Until 2:00 PM on December 3, 2025 for Furnishing The Services Described Herein. (See Special Terms & Conditions “D. Late Proposals”)**

*SEALED PROPOSALS MAY BE MAILED, EXPRESS MAILED, SUBMITTED IN eVA, OR HAND DELIVERED DIRECTLY TO THE ISSUING AGENCY SHOWN ABOVE.*

All Inquiries For Information And Clarification Should Be Directed To: Shanna Devers, Lead Commodity Contract Officer, Procurement Services, [deverssl@jmu.edu](mailto:deverssl@jmu.edu); 540-568-3131; (Fax) 540-568-7935 not later than five business days before the proposal closing date.

**NOTE: THE SIGNED PROPOSAL AND ALL ATTACHMENTS SHALL BE RETURNED.**

In compliance with this Request for Proposal and to all the conditions imposed herein, the undersigned offers and agrees to furnish the goods/services in accordance with the attached signed proposal or as mutually agreed upon by subsequent negotiation.

Name and Address of Firm:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

By: \_\_\_\_\_  
*(Signature)*

Name: \_\_\_\_\_  
*(Please Print)*

Date: \_\_\_\_\_

Title: \_\_\_\_\_

Web Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Fax #: \_\_\_\_\_

ACKNOWLEDGE RECEIPT OF ADDENDUM: #1 \_\_\_\_\_ #2 \_\_\_\_\_ #3 \_\_\_\_\_ #4 \_\_\_\_\_ #5 \_\_\_\_\_ (please initial)

SMALL, WOMAN OR MINORITY OWNED BUSINESS:

YES;  NO; *IF YES* ⇒⇒  SMALL;  WOMAN;  MINORITY ***IF MINORITY:***  AA;  HA;  AsA;  NW;  Micro

**Note: This public body does not discriminate against faith-based organizations in accordance with the Code of Virginia, § 2.2-4343.1 or against an offeror because of race, religion, color, sex, national origin, age, disability, or any other basis prohibited by state law relating to discrimination in employment.**

# ***REQUEST FOR PROPOSAL***

*RFP # SLD-1244*

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## I. PURPOSE

The purpose of this Request for Proposal (RFP) is to solicit sealed proposals from qualified sources to enter into a contract to provide Digital Strategy, Design, and Engagement Services for James Madison University (JMU), an agency of the Commonwealth of Virginia. Initial contract shall be for one (1) year with an option to renew for 4 (four) additional one-year periods.

## II. BACKGROUND

James Madison University (JMU) is a comprehensive public institution in Harrisonburg, Virginia with an enrollment of approximately 22,000 students and approximately 4,000 faculty and staff. There are over 600 individual departments on campus that support seven (7) academic divisions. The University offers over 120 majors, minors, and concentrations. Further information about the University can be found at the following website: [www.jmu.edu](http://www.jmu.edu).

The Virginia Department of Education's *I'm Determined Center* provides direct instruction, models, and opportunities to practice skills associated with self-determined behavior. This center facilitates youth, especially those with disabilities, to undertake a measure of control in their lives, helping to set and steer the course rather than remaining a silent passenger. For more information about special education programs and services in Virginia, visit the VDOE Web site at <https://www.doe.virginia.gov/programs-services/special-education>.

The *I'm Determined Center* focuses on providing direct instruction, models, and opportunities to practice skills associated with self-determined behavior beginning at the elementary level and continuing through the student's educational career. The self-determined student knows how to set and achieve goals and has a greater understanding of personal strengths and how to get support for areas of need. A hallmark of the self-determination is the "Aha Moment": the point when the student, educator, and/or parent see how the development of these skills leads to improved academic and personal outcomes. This center facilitates youth, especially those with disabilities, to undertake a measure of control in their lives, helping to set and steer the course rather than remaining the silent passenger. Teachers report seeing the "Aha Moment" in their students to be one of the greatest rewards of their career.

Participating schools have access to a suite of *I'm Determined* tools designed to assist educators, students, and families in strengthening self-determination skills. These tools—including Student Rubric for IEP Participation—expand opportunities for goal setting, choice making, problem solving, and self-awareness. Formative assessments are used to identify areas of need that can be explicitly taught, supported, and embedded within intentional learning experiences. These opportunities empower students to take an active role in their education and to develop competence, autonomy, and relatedness—fostering personal well-being, self-determination, and the capacity to navigate life's transitions in a productive manner that promotes continuous growth and development.

The *I'm Determined Center* has been funded by the Virginia Department of Education since its inception in 2005. JMU's T/TAC (which the *I'm Determined Center* was previously housed within) facilitated the rebuild and redesign of the *I'm Determined* website in 2008 ([www.imdetermined.org](http://www.imdetermined.org)). This website upgrade has allowed the project to grow from nine (9) pilot school sites in 2005 to over 70 school divisions in Virginia and over 30 states across the nation using/accessing our materials. In 2018, *I'm Determined* rebuilt the site again, introducing a new logo and branding which incorporates a space theme. Accessibility updates, a modern aesthetic, and a more robust search feature helped this next iteration house and showcase the

resources and tools freely available to youth, educators, and families. This update continued to expand its reach well beyond Virginia and even the US.

The website has a great foundation to build from; one we are not looking to rebuild. Future iterations should incorporate our current foundation and help showcase the audiences (youth, families, educators) as heroes. New site visitors should be able to easily understand the basics of self-determination, and explore without confusion, while experienced visitors should know how to dig deeper based on where they currently are. Ideas to do this include guided user journeys, educational modules, and better curated resources.

### **III. SMALL, WOMAN-OWNED AND MINORITY PARTICIPATION**

It is the policy of the Commonwealth of Virginia to contribute to the establishment, preservation, and strengthening of small businesses and businesses owned by women and minorities, and to encourage their participation in State procurement activities. The Commonwealth encourages contractors to provide for the participation of small businesses and businesses owned by women and minorities through partnerships, joint ventures, subcontracts, and other contractual opportunities. Attachment B contains information on reporting spend data with subcontractors.

### **IV. STATEMENT OF NEEDS**

- A. JMU seeks a qualified and experienced firm that can provide Digital Strategy, Design, and Engagement services on an as-needed basis to the University. Specifically, this company shall have the equipment, processes, personnel, and knowledge to provide an accessible, feature-rich online environment for current and future University projects.
- B. Thinking through content strategy and user experience will be key to getting the website to the next level, and accessibility is paramount with any updates or changes that will be made. Some ideas for future digital strategy, design, and engagement projects include, but are not limited to:
- Accessibility audit of all videos and resources to meet and exceed compliance standards, including the addition of language translations for our most utilized resources
  - A solution such as a separate landing page or website for the organization of IMD's media, including film, educational material, podcasting, and lectures
  - New ways of showcasing our audiences utilizing self-determination skills, strategies, and *I'm Determined* tools and resources
  - Solutions that allow audiences to learn about self-determination in an interactive and guided way, which could include modules, guidance through curated resources, and more
  - Solutions for the growing educator community to network and share ideas and resources
  - Solutions, such as a map with pins, that allows visitors to see where *I'm Determined* tools and resources are being utilized and practiced
  - Content strategy that allows visitors to have a more interactive experience
  - Possibilities of utilizing Ai solutions that help visitors get more out of our tools and resources
  - Brand strategy that unifies all of our communications outlets (web, social media, video, newsletter, email)
  - Incorporating revitalized, intentional visual layouts that build upon and enhance our existing brand identity.

The above listing is not a guarantee of projects and will be determined at the sole discretion of the university.

- C. Offerors shall provide detailed responses to the following:
1. Provide an executive summary of your firm including office locations, years in business, personnel information (e.g. number of employees, expertise, resumes) and services offered.
  2. Provide the resume and contact information of a primary point of contact for the University.
  3. Specify any work that your firm subcontracts out and the names of the subcontractors.
  4. Contractors shall not proceed with work under a resulting contract without a University-issued purchase order. Describe the process the University would follow to request a project quote.
  5. Describe your firm's process for determining the time/hours needed for a University project. Specify all information that will be provided on a project quote.
  6. Describe how project timelines will be determined and communicated to JMU clients. Describe your firm's process for adhering to timelines.
  7. Describe your firm's customer service model.
  8. JMU is required to comply with Title II of the Americans with Disabilities Act and Virginia's Information Technology Access Act. See <https://www.jmu.edu/accessibility/digital-accessibility/title-ii/index.shtml> for more information.
    - a. Describe your firm's ability to develop technology and applications that comply with Title II of the Americans with Disabilities Act and Virginia's Information Technology Access Act.
    - b. Describe your firm's experience in developing applications that are accessible for all levels and types of disabilities.
    - c. Provide examples of previous and/or current work demonstrating knowledge around accessibility standards.
  9. Describe internal efforts that ensure dedication to accessibility needs and responsiveness to correct reported issues (e.g. personnel training and credentials, accessibility team, issue reporting mechanisms and treatment).
  10. Describe the documentation offered for University projects.
  11. Describe the support provided during the implementation of new or updated applications.

12. Provide examples of completed digital strategy, design, and engagement work to include:
  - a. Previous project(s) related to special education and/or educational services
  - b. Previous project(s) completed for higher education
  - c. Previous project(s) showing examples of front and back-end sides of applications and unique solutions.
13. Describe your firm's experience developing customized back-end management systems.
14. Describe the plan for maintaining open communication during project work with the relevant university client.
15. Describe any additional services that your firm can offer to the University. Specify additional costs and/or hourly rates in *Section X, Pricing Schedule* of this solicitation.
16. Describe your firm's ability to provide training sessions to educators for created applications. Indicate whether this training can be provided in-person and/or via webinar. Specify additional costs in *Section X, Pricing Schedule* of this solicitation.
17. Describe your firm's ability to present innovative ideas for application updates/creation. Include details on branding strategy experience.
18. Describe the escalation process that JMU will follow in the event that problems are discovered with application(s) after its launch. Describe how your firm would resolve problems within application(s) to ensure customer satisfaction (*i.e. code issues, bugs, etc.*). Provide an explanation of any costs that the University would incur in *Section X, Pricing Schedule*.
19. Describe how your firm would propose to assist the University with service and maintenance of application(s).
20. Describe the application security features for data.
21. Describe your approach to test and production environments.
22. The University occasionally explores opportunities for hosting applications external to the university. Describe hosted and data storage services. Specify additional costs in *Section X, Pricing Schedule*.

## V. PROPOSAL PREPARATION AND SUBMISSION

### A. GENERAL INSTRUCTIONS

**To ensure timely and adequate consideration of your proposal, offerors are to limit all contact, whether verbal or written, pertaining to this RFP to the James Madison University Procurement Office for the duration of this Proposal process. Failure to do so may jeopardize further consideration of Offeror's proposal.**

**ELECTRONIC OR PAPER SUBMISSIONS MAY BE ACCEPTED FOR THIS PROPOSAL. INSTRUCTIONS BELOW FOR OFFEROR'S CHOSEN METHOD (A. ELECTRONIC SUBMISSION or B. PAPER RESPONSE).**

1. RFP Response: In order to be considered for selection, the **Offeror shall submit a complete response to this RFP**; and shall submit to the issuing Purchasing Agency:

a. **ELECTRONIC SUBMISSION:**

- i. ELECTRONIC RESPONSES SUBMITTED THROUGH eVA WILL BE ACCEPTED. **Emailed responses will not be accepted.** Please see below, "eVA Procurement Website and Registration" for additional information on registration. It is the responsibility of the Supplier to ensure their proposal and all required documentation is properly completed, readable, and uploaded to eVA. Suppliers should allow sufficient time to account for any technical difficulties they may encounter during online submission or uploading of the documents. In the event of any technical difficulties, Suppliers shall contact the eVA Customer Care Center at 1-866-289-7367 or via email at [eVACustomerCare@DGS.virginia.gov](mailto:eVACustomerCare@DGS.virginia.gov).
- ii. eVA Procurement Website and Registration The Commonwealth's procurement portal, eVA, located at <http://www.eva.virginia.gov>, provides information about Commonwealth solicitations and awards. Suppliers shall be registered in eVA in order submit a proposal to this RFP. To register with eVA, select "Register Now" on the eVA website homepage, <http://www.eva.virginia.gov>. For registration instructions and assistance, as well as instructions on how to submit proposals and accept orders please select "I Sell to Virginia". Suppliers are encouraged to check this site on a regular basis and, in particular, prior to submission of proposals to identify any amendments to the RFP that may have been issued.
- iii. Electronic Responses submitted through eVA shall be in WORD format or searchable PDF of the entire proposal, INCLUDING ALL ATTACHMENTS. PDFs must be submitted in an unlocked format. Any proprietary information should be clearly marked in accordance with Section V.4.f. below.

b. **PAPER SUBMISSIONS:**

- i. **One (1) original and two (2) copies** of the entire proposal, INCLUDING ALL ATTACHMENTS. Any proprietary information should be clearly marked in accordance with V.4.e. below.
- ii. **One (1) electronic copy in WORD format or searchable PDF (CD or flash drive)** of the entire proposal, INCLUDING ALL ATTACHMENTS. Any proprietary information should be clearly marked in accordance with Section V.4.f. below.
- iii. Each copy of the proposal should be bound or contained in a single volume where practical. All documentation submitted with the proposal should be contained in that single volume.

- iv. See additional information in Section VIII.C, *IDENIFICATION OF PROPSAL ENVELOPE*.
- 2. Should the proposal contain **proprietary information, provide one (1) redacted copy of the proposal** and all attachments with **proprietary portions removed or blacked out**. This copy should be clearly marked “*Redacted Copy*” on the front cover. The classification of an entire proposal document, line-item prices, and/or total proposal prices as proprietary or trade secrets is not acceptable. JMU shall not be responsible for the Contractor’s failure to exclude proprietary information from this redacted copy.

No other distribution of the proposal shall be made by the Offeror.

- 3. The version of the solicitation issued by JMU Procurement Services, as amended by an addenda, is the mandatory controlling version of the document. Any modification of, or additions to, the solicitation by the Offeror shall not modify the official version of the solicitation issued by JMU Procurement services unless accepted in writing by the University. Such modifications or additions to the solicitation by the Offeror may be cause for rejection of the proposal; however, JMU reserves the right to decide, on a case-by-case basis in its sole discretion, whether to reject such a proposal. If the modification or additions are not identified until after the award of the contract, the controlling version of the solicitation document shall still be the official state form issued by Procurement Services.
- 4. Proposal Preparation
  - a. Proposals shall be signed by an authorized representative of the Offeror. All information requested should be submitted. Failure to submit all information requested may result in the purchasing agency requiring prompt submissions of missing information and/or giving a lowered evaluation of the proposal. Proposals which are substantially incomplete or lack key information may be rejected by the purchasing agency. Mandatory requirements are those required by law or regulation or are such that they cannot be waived and are not subject to negotiation.
  - b. Proposals shall be prepared simply and economically, providing a straightforward, concise description of capabilities to satisfy the requirements of the RFP. Emphasis should be placed on completeness and clarity of content.
  - c. Proposals should be organized in the order in which the requirements are presented in the RFP. All pages of the proposal should be numbered. Each paragraph in the proposal should reference the paragraph number of the corresponding section of the RFP. It is also helpful to cite the paragraph number, sub letter, and repeat the text of the requirement as it appears in the RFP. If a response covers more than one page, the paragraph number and sub letter should be repeated at the top of the next page. The proposal should contain a table of contents which cross references the RFP requirements. Information which the offeror desires to present that does not fall within any of the requirements of the RFP should be inserted at the appropriate place or be attached at the end of the proposal and designated as additional material. Proposals that are not organized in this manner risk elimination from consideration if the evaluators are unable to find where the RFP requirements are specifically addressed.
  - d. As used in this RFP, the terms “must”, “shall”, “should” and “may” identify the criticality of requirements. “Must” and “shall” identify requirements whose absence will have a major negative impact on the suitability of the proposed solution. Items

labeled as “should” or “may” are highly desirable, although their absence will not have a large impact and would be useful, but are not necessary. Depending on the overall response to the RFP, some individual “must” and “shall” items may not be fully satisfied, but it is the intent to satisfy most, if not all, “must” and “shall” requirements. The inability of an offeror to satisfy a “must” or “shall” requirement does not automatically remove that offeror from consideration; however, it may seriously affect the overall rating of the offeror’ proposal.

- e. Each copy of the proposal should be bound or contained in a single volume where practical. All documentation submitted with the proposal should be contained in that single volume.
  - f. Ownership of all data, materials and documentation originated and prepared for the State pursuant to the RFP shall belong exclusively to the State and be subject to public inspection in accordance with the Virginia Freedom of Information Act. Trade secrets or proprietary information submitted by the offeror shall not be subject to public disclosure under the Virginia Freedom of Information Act; however, the offeror must invoke the protection of Section 2.2-4342F of the Code of Virginia, in writing, either before or at the time the data is submitted. **The written notice must specifically identify the data or materials to be protected and state the reasons why protection is necessary. The proprietary or trade secret materials submitted must be identified by some distinct method such as highlighting or underlining and must indicate only the specific words, figures, or paragraphs that constitute trade secret or proprietary information. The classification of an entire proposal document, line-item prices and/or total proposal prices as proprietary or trade secrets is not acceptable. Marking an entire proposal as confidential or attempts to prevent disclosure of pricing information by designating it as confidential, proprietary or trade secret will be ignored.**
5. Oral Presentation: Offerors who submit a proposal in response to this RFP may be required to give an oral presentation of their proposal to James Madison University. This provides an opportunity for the Offeror to clarify or elaborate on the proposal. This is a fact-finding and explanation session only and does not include negotiation. James Madison University will schedule the time and location of these presentations. Oral presentations are an option of the University and may or may not be conducted. Therefore, proposals should be complete.

## B. SPECIFIC PROPOSAL INSTRUCTIONS

Proposals should be as thorough and detailed as possible so that James Madison University may properly evaluate your capabilities to provide the required services. Offerors are required to submit the following items as a complete proposal:

1. Return RFP cover sheet and all addenda acknowledgements, if any, signed and filled out as required. (Electronic signature shall be accepted, i.e. Adobe Sign, DocuSign, etc.)
2. Plan and methodology for providing the goods/services as described in Section IV. Statement of Needs of this Request for Proposal.
3. A written narrative statement to include, but not be limited to, the expertise, qualifications, and experience of the firm and resumes of specific personnel to be assigned to perform the work.

4. Offeror Data Sheet, included as *Attachment A* to this RFP.
5. Small Business Subcontracting Plan, included as *Attachment B* to this RFP. Offeror shall provide a Small Business Subcontracting plan which summarizes the planned utilization of Department of Small Business and Supplier Diversity (SBSD)-certified small businesses which include businesses owned by women and minorities, when they have received Department of Small Business and Supplier Diversity (SBSD) small business certification, under the contract to be awarded as a result of this solicitation. This is a requirement for all prime contracts in excess of \$100,000 unless no subcontracting opportunities exist.
6. Identify the amount of sales your company had during the last twelve months with each VASCUPP Member Institution. A list of VASCUPP Members can be found at: [www.VASCUPP.org](http://www.VASCUPP.org).
7. Proposed Cost. See Section X. Pricing Schedule of this Request for Proposal

## VI. EVALUATION AND AWARD CRITERIA

### A. EVALUATION CRITERIA

Proposals shall be evaluated by James Madison University using the following criteria:

	<u>Points</u>
1. Quality of products/services offered and suitability for intended purposes	25
2. Qualifications and experience of Offeror in providing the goods/services	25
3. Specific plans or methodology to be used to perform the services	25
4. Participation of Small, Women-Owned, & Minority (SWaM) Businesses	10
5. Cost	<u>15</u>
	100

- B. AWARD TO MULTIPLE OFFERORS: Selection shall be made of two or more offerors deemed to be fully qualified and best suited among those submitting proposals on the basis of the evaluation factors included in the Request for Proposals, including price, if so stated in the Request for Proposals. Negotiations shall be conducted with the offerors so selected. Price shall be considered, but need not be the sole determining factor. After negotiations have been conducted with each offeror so selected, the agency shall select the offeror which, in its opinion, has made the best proposal, and shall award the contract to that offeror. The Commonwealth reserves the right to make multiple awards as a result of this solicitation. The Commonwealth may cancel this Request for Proposals or reject proposals at any time prior to an award, and is not required to furnish a statement of the reasons why a particular proposal was not deemed to be the most advantageous. Should the Commonwealth determine in writing and in its sole discretion that only one offeror is fully qualified, or that one offeror is clearly more highly qualified than the others under consideration, a contract may be negotiated and awarded to that offeror. The award document will be a contract incorporating by reference all the requirements, terms and conditions of the solicitation and the contractor's proposal as negotiated.

## VII. GENERAL TERMS AND CONDITIONS

- A. PURCHASING MANUAL: This solicitation is subject to the provisions of the Commonwealth of Virginia's Purchasing Manual for Institutions of Higher Education and Their Vendors and any revisions thereto, which are hereby incorporated into this contract in their entirety. A copy of the manual is available for review at the purchasing office. In addition, the manual may be accessed electronically at <http://www.jmu.edu/procurement> or a copy can be obtained by calling Procurement Services at (540) 568-3145.
- B. APPLICABLE LAWS AND COURTS: This solicitation and any resulting contract shall be governed in all respects by the laws of the Commonwealth of Virginia and any litigation with respect thereto shall be brought in the courts of the Commonwealth. The Contractor shall comply with applicable federal, state and local laws and regulations.
- C. ANTI-DISCRIMINATION: By submitting their proposals, offerors certify to the Commonwealth that they will conform to the provisions of the Federal Civil Rights Act of 1964, as amended, as well as the Virginia Fair Employment Contracting Act of 1975, as amended, where applicable, the Virginians With Disabilities Act, the Americans With Disabilities Act and §10 of the Rules Governing Procurement, Chapter 2, Exhibit J, Attachment 1 (available for review at <http://www.jmu.edu/procurement>). If the award is made to a faith-based organization, the organization shall not discriminate against any recipient of goods, services, or disbursements made pursuant to the contract on the basis of the recipient's religion, religious belief, refusal to participate in a religious practice, or on the basis of race, age, color, gender, sexual orientation, gender identity, or national origin and shall be subject to the same rules as other organizations that contract with public bodies to account for the use of the funds provided; however, if the faith-based organization segregates public funds into separate accounts, only the accounts and programs funded with public funds shall be subject to audit by the public body. (*§6 of the Rules Governing Procurement*).

In every contract over \$10,000 the provisions in 1. and 2. below apply:

1. During the performance of this contract, the contractor agrees as follows:
  - a. The contractor will not discriminate against any employee or applicant for employment because of race, religion, color, sex, sexual orientation, gender identity, national origin, age, disability, or any other basis prohibited by state law relating to discrimination in employment, except where there is a bona fide occupational qualification reasonably necessary to the normal operation of the contractor. The contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices setting forth the provisions of this nondiscrimination clause.
  - b. The contractor, in all solicitations or advertisements for employees placed by or on behalf of the contractor, will state that such contractor is an equal opportunity employer.
  - c. Notices, advertisements, and solicitations placed in accordance with federal law, rule, or regulation shall be deemed sufficient for the purpose of meeting these requirements.
2. The contractor will include the provisions of 1. above in every subcontract or purchase order over \$10,000, so that the provisions will be binding upon each subcontractor or vendor.

- D. ETHICS IN PUBLIC CONTRACTING: By submitting their proposals, offerors certify that their proposals are made without collusion or fraud and that they have not offered or received any kickbacks or inducements from any other offeror, supplier, manufacturer or subcontractor in connection with their proposal, and that they have not conferred on any public employee having official responsibility for this procurement transaction any payment, loan, subscription, advance, deposit of money, services or anything of more than nominal value, present or promised, unless consideration of substantially equal or greater value was exchanged.
- E. IMMIGRATION REFORM AND CONTROL ACT OF 1986: By entering into a written contract with the Commonwealth of Virginia, the Contractor certifies that the Contractor does not, and shall not during the performance of the contract for goods and services in the Commonwealth, knowingly employ an unauthorized alien as defined in the federal Immigration Reform and Control Act of 1986.
- F. DEBARMENT STATUS: By submitting their proposals, offerors certify that they are not currently debarred by the Commonwealth of Virginia from submitting proposals on contracts for the type of goods and/or services covered by this solicitation, nor are they an agent of any person or entity that is currently so debarred.
- G. ANTITRUST: By entering into a contract, the contractor conveys, sells, assigns, and transfers to the Commonwealth of Virginia all rights, title and interest in and to all causes of action it may now have or hereafter acquire under the antitrust laws of the United States and the Commonwealth of Virginia, relating to the particular goods or services purchased or acquired by the Commonwealth of Virginia under said contract.
- H. MANDATORY USE OF STATE FORM AND TERMS AND CONDITIONS RFPs: Failure to submit a proposal on the official state form provided for that purpose may be a cause for rejection of the proposal. Modification of or additions to the General Terms and Conditions of the solicitation may be cause for rejection of the proposal; however, the Commonwealth reserves the right to decide, on a case by case basis, in its sole discretion, whether to reject such a proposal.
- I. CLARIFICATION OF TERMS: If any prospective offeror has questions about the specifications or other solicitation documents, the prospective offeror should contact the buyer whose name appears on the face of the solicitation no later than five working days before the due date. Any revisions to the solicitation will be made only by addendum issued by the buyer.
- J. PAYMENT:
1. To Prime Contractor:
    - a. Invoices for items ordered, delivered and accepted shall be submitted by the contractor directly to the payment address shown on the purchase order/contract. All invoices shall show the state contract number and/or purchase order number; social security number (for individual contractors) or the federal employer identification number (for proprietorships, partnerships, and corporations).
    - b. Any payment terms requiring payment in less than 30 days will be regarded as requiring payment 30 days after invoice or delivery, whichever occurs last. This shall not affect offers of discounts for payment in less than 30 days, however.

- c. All goods or services provided under this contract or purchase order, that are to be paid for with public funds, shall be billed by the contractor at the contract price, regardless of which public agency is being billed.
- d. The following shall be deemed to be the date of payment: the date of postmark in all cases where payment is made by mail, or the date of offset when offset proceedings have been instituted as authorized under the Virginia Debt Collection Act.
- e. Unreasonable Charges. Under certain emergency procurements and for most time and material purchases, final job costs cannot be accurately determined at the time orders are placed. In such cases, contractors should be put on notice that final payment in full is contingent on a determination of reasonableness with respect to all invoiced charges. Charges which appear to be unreasonable will be researched and challenged, and that portion of the invoice held in abeyance until a settlement can be reached. Upon determining that invoiced charges are not reasonable, the Commonwealth shall promptly notify the contractor, in writing, as to those charges which it considers unreasonable and the basis for the determination. A contractor may not institute legal action unless a settlement cannot be reached within thirty (30) days of notification. The provisions of this section do not relieve an agency of its prompt payment obligations with respect to those charges which are not in dispute (*Rules Governing Procurement, Chapter 2, Exhibit J, Attachment 1 § 53; available for review at <http://www.jmu.edu/procurement>*).

2. To Subcontractors:

- a. A contractor awarded a contract under this solicitation is hereby obligated:

- (1) To pay the subcontractor(s) within seven (7) days of the contractor's receipt of payment from the Commonwealth for the proportionate share of the payment received for work performed by the subcontractor(s) under the contract; or
- (2) To notify the agency and the subcontractors, in writing, of the contractor's intention to withhold payment and the reason.

- b. The contractor is obligated to pay the subcontractor(s) interest at the rate of one percent per month (unless otherwise provided under the terms of the contract) on all amounts owed by the contractor that remain unpaid seven (7) days following receipt of payment from the Commonwealth, except for amounts withheld as stated in (2) above. The date of mailing of any payment by U. S. Mail is deemed to be payment to the addressee. These provisions apply to each sub-tier contractor performing under the primary contract. A contractor's obligation to pay an interest charge to a subcontractor may not be construed to be an obligation of the Commonwealth.

- 3. Each prime contractor who wins an award in which provision of a SWAM procurement plan is a condition to the award, shall deliver to the contracting agency or institution, on or before request for final payment, evidence and certification of compliance (subject only to insubstantial shortfalls and to shortfalls arising from subcontractor default) with the SWAM procurement plan. Final payment under the contract in question may be withheld until such certification is delivered and, if necessary, confirmed by the agency or institution, or other appropriate penalties may be assessed in lieu of withholding such payment.

4. The Commonwealth of Virginia encourages contractors and subcontractors to accept electronic and credit card payments.
- K. PRECEDENCE OF TERMS: Paragraphs A through J of these General Terms and Conditions and the Commonwealth of Virginia Purchasing Manual for Institutions of Higher Education and their Vendors, shall apply in all instances. In the event there is a conflict between any of the other General Terms and Conditions and any Special Terms and Conditions in this solicitation, the Special Terms and Conditions shall apply.
- L. QUALIFICATIONS OF OFFERORS: The Commonwealth may make such reasonable investigations as deemed proper and necessary to determine the ability of the offeror to perform the services/furnish the goods and the offeror shall furnish to the Commonwealth all such information and data for this purpose as may be requested. The Commonwealth reserves the right to inspect offeror's physical facilities prior to award to satisfy questions regarding the offeror's capabilities. The Commonwealth further reserves the right to reject any proposal if the evidence submitted by, or investigations of, such offeror fails to satisfy the Commonwealth that such offeror is properly qualified to carry out the obligations of the contract and to provide the services and/or furnish the goods contemplated therein.
- M. TESTING AND INSPECTION: The Commonwealth reserves the right to conduct any test/inspection it may deem advisable to assure goods and services conform to the specifications.
- N. ASSIGNMENT OF CONTRACT: A contract shall not be assignable by the contractor in whole or in part without the written consent of the Commonwealth.
- O. CHANGES TO THE CONTRACT: Changes can be made to the contract in any of the following ways:
1. The parties may agree in writing to modify the scope of the contract. An increase or decrease in the price of the contract resulting from such modification shall be agreed to by the parties as a part of their written agreement to modify the scope of the contract.
  2. The Purchasing Agency may order changes within the general scope of the contract at any time by written notice to the contractor. Changes within the scope of the contract include, but are not limited to, things such as services to be performed, the method of packing or shipment, and the place of delivery or installation. The contractor shall comply with the notice upon receipt. The contractor shall be compensated for any additional costs incurred as the result of such order and shall give the Purchasing Agency a credit for any savings. Said compensation shall be determined by one of the following methods:
    - a. By mutual agreement between the parties in writing; or
    - b. By agreeing upon a unit price or using a unit price set forth in the contract, if the work to be done can be expressed in units, and the contractor accounts for the number of units of work performed, subject to the Purchasing Agency's right to audit the contractor's records and/or to determine the correct number of units independently; or
    - c. By ordering the contractor to proceed with the work and keep a record of all costs incurred and savings realized. A markup for overhead and profit may be allowed if provided by the contract. The same markup shall be used for determining a decrease in price as the result of savings realized. The contractor shall present the Purchasing Agency with all vouchers and records of expenses incurred and savings realized. The Purchasing Agency shall have the right to audit the records of the contractor as it deems

necessary to determine costs or savings. Any claim for an adjustment in price under this provision must be asserted by written notice to the Purchasing Agency within thirty (30) days from the date of receipt of the written order from the Purchasing Agency. If the parties fail to agree on an amount of adjustment, the question of an increase or decrease in the contract price or time for performance shall be resolved in accordance with the procedures for resolving disputes provided by the Disputes Clause of this contract or, if there is none, in accordance with the disputes provisions of the Commonwealth of Virginia Purchasing Manual for Institutions of Higher Education and their Vendors. Neither the existence of a claim nor a dispute resolution process, litigation or any other provision of this contract shall excuse the contractor from promptly complying with the changes ordered by the Purchasing Agency or with the performance of the contract generally.

- P. DEFAULT: In case of failure to deliver goods or services in accordance with the contract terms and conditions, the Commonwealth, after due oral or written notice, may procure them from other sources and hold the contractor responsible for any resulting additional purchase and administrative costs. This remedy shall be in addition to any other remedies which the Commonwealth may have.
- Q. INSURANCE: By signing and submitting a proposal under this solicitation, the offeror certifies that if awarded the contract, it will have the following insurance coverage at the time the contract is awarded. For construction contracts, if any subcontractors are involved, the subcontractor will have workers' compensation insurance in accordance with § 25 of the Rules Governing Procurement – Chapter 2, Exhibit J, Attachment 1, and 65.2-800 et. Seq. of the Code of Virginia (available for review at <http://www.jmu.edu/procurement>). The offeror further certifies that the contractor and any subcontractors will maintain these insurance coverage during the entire term of the contract and that all insurance coverage will be provided by insurance companies authorized to sell insurance in Virginia by the Virginia State Corporation Commission.

MINIMUM INSURANCE COVERAGES AND LIMITS REQUIRED FOR MOST CONTRACTS:

1. Workers' Compensation: Statutory requirements and benefits. Coverage is compulsory for employers of three or more employees, to include the employer. Contractors who fail to notify the Commonwealth of increases in the number of employees that change their workers' compensation requirement under the Code of Virginia during the course of the contract shall be in noncompliance with the contract.
  2. Employer's Liability: \$100,000
  3. Commercial General Liability: \$1,000,000 per occurrence and \$2,000,000 in the aggregate. Commercial General Liability is to include bodily injury and property damage, personal injury and advertising injury, products and completed operations coverage. The Commonwealth of Virginia must be named as an additional insured and so endorsed on the policy.
  4. Automobile Liability: \$1,000,000 combined single limit. *(Required only if a motor vehicle not owned by the Commonwealth is to be used in the contract. Contractor must assure that the required coverage is maintained by the Contractor (or third party owner of such motor vehicle.)*
- R. ANNOUNCEMENT OF AWARD: Upon the award or the announcement of the decision to award a contract over \$100,000, as a result of this solicitation, the purchasing agency will

publicly post such notice on the DGS/DPS eVA web site ([www.eva.virginia.gov](http://www.eva.virginia.gov)) for a minimum of 10 days.

- S. DRUG-FREE WORKPLACE: During the performance of this contract, the contractor agrees to (i) provide a drug-free workplace for the contractor's employees; (ii) post in conspicuous places, available to employees and applicants for employment, a statement notifying employees that the unlawful manufacture, sale, distribution, dispensation, possession, or use of a controlled substance or marijuana is prohibited in the contractor's workplace and specifying the actions that will be taken against employees for violations of such prohibition; (iii) state in all solicitations or advertisements for employees placed by or on behalf of the contractor that the contractor maintains a drug-free workplace; and (iv) include the provisions of the foregoing clauses in every subcontract or purchase order of over \$10,000, so that the provisions will be binding upon each subcontractor or vendor.

For the purposes of this section, "drug-free workplace" means a site for the performance of work done in connection with a specific contract awarded to a contractor, the employees of whom are prohibited from engaging in the unlawful manufacture, sale, distribution, dispensation, possession or use of any controlled substance or marijuana during the performance of the contract.

- T. NONDISCRIMINATION OF CONTRACTORS: An offeror, or contractor shall not be discriminated against in the solicitation or award of this contract because of race, religion, color, sex, sexual orientation, gender identity, national origin, age, disability, faith-based organizational status, any other basis prohibited by state law relating to discrimination in employment or because the offeror employs ex-offenders unless the state agency, department or institution has made a written determination that employing ex-offenders on the specific contract is not in its best interest. If the award of this contract is made to a faith-based organization and an individual, who applies for or receives goods, services, or disbursements provided pursuant to this contract objects to the religious character of the faith-based organization from which the individual receives or would receive the goods, services, or disbursements, the public body shall offer the individual, within a reasonable period of time after the date of his objection, access to equivalent goods, services, or disbursements from an alternative provider.

- U. eVA BUSINESS TO GOVERNMENT VENDOR REGISTRATION, CONTRACTS, AND ORDERS: The eVA Internet electronic procurement solution, website portal [www.eva.virginia.gov](http://www.eva.virginia.gov), streamlines and automates government purchasing activities in the Commonwealth. The eVA portal is the gateway for vendors to conduct business with state agencies and public bodies. All vendors desiring to provide goods and/or services to the Commonwealth shall participate in the eVA Internet eprocurement solution by completing the free eVA Vendor Registration. All offerors must register in eVA and pay the Vendor Transaction Fees specified below; failure to register will result in the proposal being rejected. Vendor transaction fees are determined by the date the original purchase order is issued and the current fees are as follows:

Vendor transaction fees are determined by the date the original purchase order is issued and the current fees are as follows:

1. For orders issued July 1, 2014 and after, the Vendor Transaction Fee is:
  - a. Department of Small Business and Supplier Diversity (SBSD) certified Small Businesses: 1% capped at \$500 per order.

- b. Businesses that are not Department of Small Business and Supplier Diversity (SBSD) certified Small Businesses: 1% capped at \$1,500 per order.
  - 2. For orders issued prior to July 1, 2014 the vendor transaction fees can be found at [www.eVA.virginia.gov](http://www.eVA.virginia.gov).
  - 3. The specified vendor transaction fee will be invoiced by the Commonwealth of Virginia Department of General Services approximately 60 days after the corresponding purchase order is issued and payable 30 days after the invoice date. Any adjustments (increases/decreases) will be handled through purchase order changes.
- V. AVAILABILITY OF FUNDS: It is understood and agreed between the parties herein that the Commonwealth of Virginia shall be bound hereunder only to the extent of the funds available or which may hereafter become available for the purpose of this agreement.
- W. PRICING CURRENCY: Unless stated otherwise in the solicitation, offerors shall state offered prices in U.S. dollars.
- X. E-VERIFY REQUIREMENT OF ANY CONTRACTOR: Any employer with more than an average of 50 employees for the previous 12 months entering into a contract in excess of \$50,000 with James Madison University to perform work or provide services pursuant to such contract shall register and participate in the E-Verify program to verify information and work authorization of its newly hired employees performing work pursuant to any awarded contract.
- Y. CIVILITY IN STATE WORKPLACES: The contractor shall take all reasonable steps to ensure that no individual, while performing work on behalf of the contractor or any subcontractor in connection with this agreement (each, a "Contract Worker"), shall engage in 1) harassment (including sexual harassment), bullying, cyber-bullying, or threatening or violent conduct, or 2) discriminatory behavior on the basis of race, sex, color, national origin, religious belief, sexual orientation, gender identity or expression, age, political affiliation, veteran status, or disability.

The contractor shall provide each Contract Worker with a copy of this Section and will require Contract Workers to participate in training on civility in the State workplace. Upon request, the contractor shall provide documentation that each Contract Worker has received such training.

For purposes of this Section, "State workplace" includes any location, permanent or temporary, where a Commonwealth employee performs any work-related duty or is representing his or her agency, as well as surrounding perimeters, parking lots, outside meeting locations, and means of travel to and from these locations. Communications are deemed to occur in a State workplace if the Contract Worker reasonably should know that the phone number, email, or other method of communication is associated with a State workplace or is associated with a person who is a State employee.

The Commonwealth of Virginia may require, at its sole discretion, the removal and replacement of any Contract Worker who the Commonwealth reasonably believes to have violated this Section.

This Section creates obligations solely on the part of the contractor. Employees or other third parties may benefit incidentally from this Section and from training materials or other communications distributed on this topic, but the Parties to this agreement intend this Section to be enforceable solely by the Commonwealth and not by employees or other third parties.

- Z. TAXES: Sales to the Commonwealth of Virginia are normally exempt from State sales tax. State sales and use tax certificates of exemption, Form ST-12, will be issued upon request. Deliveries against this contract shall usually be free of Federal excise and transportation taxes. The Commonwealth's excise tax exemption registration number is 54-73-0076K.

**VIII. SPECIAL TERMS AND CONDITIONS**

- A. AUDIT: The Contractor hereby agrees to retain all books, records, systems, and other documents relative to this contract for five (5) years after final payment, or until audited by the Commonwealth of Virginia, whichever is sooner. The Commonwealth of Virginia, its authorized agents, and/or State auditors shall have full access to and the right to examine any of said materials during said period.
- B. CANCELLATION OF CONTRACT: James Madison University reserves the right to cancel and terminate any resulting contract, in part or in whole, without penalty, upon 60 days written notice to the contractor. In the event the initial contract period is for more than 12 months, the resulting contract may be terminated by either party, without penalty, after the initial 12 months of the contract period upon 60 days written notice to the other party. Any contract cancellation notice shall not relieve the contractor of the obligation to deliver and/or perform on all outstanding orders issued prior to the effective date of cancellation.
- C. IDENTIFICATION OF PROPOSAL ENVELOPE: The signed proposal should be returned in a separate envelope or package, sealed and identified as follows:

From: \_\_\_\_\_

Name of Offeror	Due Date	Time
Street or Box No.	RFP #	
City, State, Zip Code	RFP Title	

Name of Purchasing Officer: \_\_\_\_\_

The envelope should be addressed as directed on the title page of the solicitation.

The Offeror takes the risk that if the envelope is not marked as described above, it may be inadvertently opened and the information compromised, which may cause the proposal to be disqualified. Proposals may be hand-delivered to the designated location in the office issuing the solicitation. No other correspondence or other proposals should be placed in the envelope.

- D. LATE PROPOSALS: To be considered for selection, proposals must be received by the issuing office by the designated date and hour. The official time used in the receipt of proposals is that time on the automatic time stamp machine in the issuing office. Proposals received in the issuing office after the date and hour designated are automatically non responsive and will not be considered. The University is not responsible for delays in the delivery of mail by the U.S. Postal Service, private couriers, or the intra university mail system. It is the sole responsibility of the Offeror to ensure that its proposal reaches the issuing office by the designated date and hour.
- E. UNDERSTANDING OF REQUIREMENTS: It is the responsibility of each offeror to inquire about and clarify any requirements of this solicitation that is not understood. The University will not be bound by oral explanations as to the meaning of specifications or language contained in this solicitation. Therefore, all inquiries deemed to be substantive in nature must be in writing and submitted to the responsible buyer in the Procurement Services Office. Offerors

must ensure that written inquiries reach the buyer at least five (5) days prior to the time set for receipt of offerors proposals. A copy of all queries and the respective response will be provided in the form of an addendum to all offerors who have indicated an interest in responding to this solicitation. Your signature on your Offer certifies that you fully understand all facets of this solicitation. These questions may be sent via email directly to the Procurement Officer listed on the signature page of this solicitation or by Fax to 540/568-7935.

- F. RENEWAL OF CONTRACT: This contract may be renewed by the Commonwealth for a period of four (4) successive one year periods under the terms and conditions of the original contract except as stated in 1. and 2. below. Price increases may be negotiated only at the time of renewal. Written notice of the Commonwealth's intention to renew shall be given approximately 90 days prior to the expiration date of each contract period.
1. If the Commonwealth elects to exercise the option to renew the contract for an additional one-year period, the contract price(s) for the additional one year shall not exceed the contract price(s) of the original contract increased/decreased by no more than the percentage increase/decrease of the other services category of the CPI-W section of the Consumer Price Index of the United States Bureau of Labor Statistics for the latest twelve months for which statistics are available.
  2. If during any subsequent renewal periods, the Commonwealth elects to exercise the option to renew the contract, the contract price(s) for the subsequent renewal period shall not exceed the contract price(s) of the previous renewal period increased/decreased by more than the percentage increase/decrease of the other services category of the CPI-W section of the Consumer Price Index of the United States Bureau of Labor Statistics for the latest twelve months for which statistics are available.
- G. SUBMISSION OF INVOICES: All invoices shall be submitted within sixty days of contract term expiration for the initial contract period as well as for each subsequent contract renewal period. Any invoices submitted after the sixty day period will not be processed for payment.
- H. OPERATING VEHICLES ON JAMES MADISON UNIVERSITY CAMPUS: Operating vehicles on sidewalks, plazas, and areas heavily used by pedestrians is prohibited. In the unlikely event a driver should find it necessary to drive on James Madison University sidewalks, plazas, and areas heavily used by pedestrians, the driver must yield to pedestrians. For a complete list of parking regulations, please go to [www.jmu.edu/parking](http://www.jmu.edu/parking); or to acquire a service representative parking permit, contact Parking Services at 540.568.3300. The safety of our students, faculty and staff is of paramount importance to us. Accordingly, violators may be charged.
- I. COOPERATIVE PURCHASING / USE OF AGREEMENT BY THIRD PARTIES: It is the intent of this solicitation and resulting contract(s) to allow for cooperative procurement. Accordingly, any public body, (to include government/state agencies, political subdivisions, etc.), cooperative purchasing organizations, public or private health or educational institutions or any University related foundation and affiliated corporations may access any resulting contract if authorized by the Contractor.

Participation in this cooperative procurement is strictly voluntary. If authorized by the Contractor(s), the resultant contract(s) will be extended to the entities indicated above to purchase goods and services in accordance with contract terms. As a separate contractual relationship, the participating entity will place its own orders directly with the Contractor(s) and shall fully and independently administer its use of the contract(s) to include contractual disputes, invoicing and payments without direct administration from the University. No modification of this contract or execution of a separate agreement is required to participate;

however, the participating entity and the Contractor may modify the terms and conditions of this contract to accommodate specific governing laws, regulations, policies, and business goals required by the participating entity. Any such modification will apply solely between the participating entity and the Contractor.

The Contractor will notify the University in writing of any such entities accessing this contract. The Contractor will provide semi-annual usage reports for all entities accessing the contract. The University shall not be held liable for any costs or damages incurred by any other participating entity as a result of any authorization by the Contractor to extend the contract. It is understood and agreed that the University is not responsible for the acts or omissions of any entity and will not be considered in default of the contract no matter the circumstances.

Use of this contract(s) does not preclude any participating entity from using other contracts or competitive processes as needed.

J. SMALL BUSINESS SUBCONTRACTING AND EVIDENCE OF COMPLIANCE:

1. It is the goal of the Commonwealth that 42% of its purchases are made from small businesses. This includes discretionary spending in prime contracts and subcontracts. All potential offerors are required to submit a Small Business Subcontracting Plan. Unless the offeror is registered as a Department of Small Business and Supplier Diversity (SBSD)-certified small business and where it is practicable for any portion of the awarded contract to be subcontracted to other suppliers, the contractor is encouraged to offer such subcontracting opportunities to SBSD-certified small businesses. This shall not exclude SBSD-certified women-owned and minority-owned businesses when they have received SBSD small business certification. No offeror or subcontractor shall be considered a Small Business, a Women-Owned Business or a Minority-Owned Business unless certified as such by the Department of Small Business and Supplier Diversity (SBSD) by the due date for receipt of proposals. If small business subcontractors are used, the prime contractor agrees to report the use of small business subcontractors by providing the purchasing office at a minimum the following information: name of small business with the SBSD certification number or FEIN, phone number, total dollar amount subcontracted, category type (small, women-owned, or minority-owned), and type of product/service provided. **This information shall be submitted to: JMU Office of Procurement Services, Attn: SWAM Subcontracting Compliance, MSC 5720, Harrisonburg, VA 22807 or [swamreporting@jmu.edu](mailto:swamreporting@jmu.edu) .**
2. Each prime contractor who wins an award in which provision of a small business subcontracting plan is a condition of the award, shall deliver to the contracting agency or institution with every request for payment, evidence of compliance (subject only to insubstantial shortfalls and to shortfalls arising from subcontractor default) with the small business subcontracting plan. **This information shall be submitted to: JMU Office of Procurement Services, SWAM Subcontracting Compliance, MSC 5720, Harrisonburg, VA 22807 or [swamreporting@jmu.edu](mailto:swamreporting@jmu.edu) .** When such business has been subcontracted to these firms and upon completion of the contract, the contractor agrees to furnish the purchasing office at a minimum the following information: name of firm with the Department of Small Business and Supplier Diversity (SBSD) certification number or FEIN number, phone number, total dollar amount subcontracted, category type (small, women-owned, or minority-owned), and type of product or service provided. Payment(s) may be withheld until compliance with the plan is received and confirmed by the agency or institution. The agency or institution reserves the right to pursue other appropriate remedies to include, but not be limited to, termination for default.

3. Each prime contractor who wins an award valued over \$200,000 shall deliver to the contracting agency or institution with every request for payment, information on use of subcontractors that are not Department of Small Business and Supplier Diversity (SBSD)-certified small businesses. When such business has been subcontracted to these firms and upon completion of the contract, the contractor agrees to furnish the purchasing office at a minimum the following information: name of firm, phone number, FEIN number, total dollar amount subcontracted, and type of product or service provided. **This information shall be submitted to: JMU Office of Procurement Services, Attn: SWAM Subcontracting Compliance, MSC 5720, Harrisonburg, VA 22807 or [swamreporting@jmu.edu](mailto:swamreporting@jmu.edu).**
- K. AUTHORIZATION TO CONDUCT BUSINESS IN THE COMMONWEALTH: A contractor organized as a stock or nonstock corporation, limited liability company, business trust, or limited partnership or registered as a registered limited liability partnership shall be authorized to transact business in the Commonwealth as a domestic or foreign business entity if so required by Title 13.1 or Title 50 of the Code of Virginia or as otherwise required by law. Any business entity described above that enters into a contract with a public body shall not allow its existence to lapse or its certificate of authority or registration to transact business in the Commonwealth, if so required under Title 13.1 or Title 50, to be revoked or cancelled at any time during the term of the contract. A public body may void any contract with a business entity if the business entity fails to remain in compliance with the provisions of this section.
- L. PUBLIC POSTING OF COOPERATIVE CONTRACTS: James Madison University maintains a web-based contracts database with a public gateway access. Any resulting cooperative contract/s to this solicitation will be posted to the publicly accessible website. Contents identified as proprietary information will not be made public.
- M. CRIMINAL BACKGROUND CHECKS OF PERSONNEL ASSIGNED BY CONTRACTOR TO PERFORM WORK ON JMU PROPERTY: The Contractor shall obtain criminal background checks on all of their contracted employees who will be assigned to perform services on James Madison University property. The results of the background checks will be directed solely to the Contractor. The Contractor bears responsibility for confirming to the University contract administrator that the background checks have been completed prior to work being performed by their employees or subcontractors. The Contractor shall only assign to work on the University campus those individuals whom it deems qualified and permissible based on the results of completed background checks. Notwithstanding any other provision herein, and to ensure the safety of students, faculty, staff and facilities, James Madison University reserves the right to approve or disapprove any contract employee that will work on JMU property. Disapproval by the University will solely apply to JMU property and should have no bearing on the Contractor's employment of an individual outside of James Madison University.
- N. INDEMNIFICATION: Contractor agrees to indemnify, defend and hold harmless the Commonwealth of Virginia, its officers, agents, and employees from any claims, damages and actions of any kind or nature, whether at law or in equity, arising from or caused by the use of any materials, goods, or equipment of any kind or nature furnished by the contractor/any services of any kind or nature furnished by the contractor, provided that such liability is not attributable to the sole negligence of the using agency or to failure of the using agency to use the materials, goods, or equipment in the manner already and permanently described by the contractor on the materials, goods or equipment delivered.
- O. ADDITIONAL GOODS AND SERVICES: The University may acquire other goods or services that the supplier provides than those specifically solicited. The University reserves

the right, subject to mutual agreement, for the Contractor to provide additional goods and/or services under the same pricing, terms, and conditions and to make modifications or enhancements to the existing goods and services. Such additional goods and services may include other products, components, accessories, subsystems, or related services that are newly introduced during the term of this Agreement. Such additional goods and services will be provided to the University at favored nations pricing, terms, and conditions.

- P. ADVERTISING: In the event a contract is awarded for supplies, equipment, or services resulting from this proposal, no indication of such sales or services to James Madison University will be used in product literature or advertising without the express written consent of the University. The contractor shall not state in any of its advertising or product literature that James Madison University has purchased or uses any of its products or services, and the contractor shall not include James Madison University in any client list in advertising and promotional materials without the express written consent of the University.
- Q. PRIME CONTRACTOR RESPONSIBILITIES: The contractor shall be responsible for completely supervising and directing the work under this contract and all subcontractors that he may utilize, using his best skill and attention. Subcontractors who perform work under this contract shall be responsible to the prime contractor. The contractor agrees that he is as fully responsible for the acts and omissions of his subcontractors and of persons employed by them as he is for the acts and omissions of his own employees.
- R. SUBCONTRACTS: No portion of the work shall be subcontracted without prior written consent of the purchasing agency. In the event that the contractor desires to subcontract some part of the work specified herein, the contractor shall furnish the purchasing agency the names, qualifications and experience of their proposed subcontractors. The contractor shall, however, remain fully liable and responsible for the work to be done by its subcontractor(s) and shall assure compliance with all requirements of the contract.
- S. WORK ESTIMATES: The contractor shall furnish the agency with a written estimate of the total costs to complete the work required. The estimate must include the labor category(ies), the contractor's hourly rates specified in the contract, and any other charges agreed to in the contract. If the agency determines that the estimated price is not fair and reasonable, the agency has the right to ask the contractor to reevaluate the estimate. At the agency's sole discretion, a purchase order will be issued to the contractor, as the authority to proceed with the work, which will incorporate the contractor's estimate and the terms and conditions of the contract. The contractor shall submit invoices only for completed work.
- T. CONFIDENTIALITY OF PERSONALLY IDENTIFIABLE INFORMATION: The contractor assures that information and data obtained as to personal facts and circumstances related to faculty, staff, students, and affiliates will be collected and held confidential, during and following the term of this agreement, and will not be divulged without the individual's and the agency's written consent and only in accordance with federal law or the Code of Virginia. This shall include FTI, which is a term of art and consists of federal tax returns and return information (*and information derived from it*) that is in contractor/agency possession or control which is covered by the confidentiality protections of the Internal Revenue Code (*IRC*) and subject to the IRC 6103(p)(4) safeguarding requirements including IRS oversight. FTI is categorized as sensitive but unclassified information and may contain personally identifiable information (*PII*). Contractors who utilize, access, or store personally identifiable information as part of the performance of a contract are required to safeguard this information and immediately notify the agency of any breach or suspected breach in the security of such information. Contractors shall allow the agency to both participate in the investigation of

incidents and exercise control over decisions regarding external reporting. Contractors and their employees working on this project may be required to sign a confidentiality statement.

U. **NONVISUAL ACCESS TO TECHNOLOGY:** All information technology which, pursuant to this Agreement, is purchased or upgraded by or for the use of any State agency or institution or political subdivision of the Commonwealth (the "Technology") shall comply with the following nonvisual access standards from the date of purchase or upgrade until the expiration of this Agreement:

- (i) effective, interactive control and use of the Technology shall be readily achievable by nonvisual means;
- (ii) the Technology equipped for nonvisual access shall be compatible with information technology used by other individuals with whom any blind or visually impaired user of the Technology interacts;
- (iii) nonvisual access technology shall be integrated into any networks used to share communications among employees, program participants or the public; and
- (iv) the technology for nonvisual access shall have the capability of providing equivalent access by nonvisual means to telecommunications or other interconnected network services used by persons who are not blind or visually impaired.

Compliance with the foregoing nonvisual access standards shall not be required if the head of the using agency, institution or political subdivision determines that (i) the Technology is not available with nonvisual access because the essential elements of the Technology are visual and (ii) nonvisual equivalence is not available.

Installation of hardware, software or peripheral devices used for nonvisual access is not required when the Technology is being used exclusively by individuals who are not blind or visually impaired, but applications programs and underlying operating systems (including the format of the data) used for the manipulation and presentation of information shall permit the installation and effective use of nonvisual access software and peripheral devices.

If requested, the Contractor must provide a detailed explanation of how compliance with the foregoing nonvisual access standards is achieved and a validation of concept demonstration.

The requirements of this Paragraph shall be construed to achieve full compliance with the Information Technology Access Act, 2.2-3500 through 2.2-3504 of the Code of Virginia.

All information technology which, pursuant to this Agreement, is purchased or upgraded by or for the use of any Commonwealth agency or institution or political subdivision of the Commonwealth (the "Technology") shall comply with Section 508 of the Rehabilitation Act (29 U.S.C. 794d), as amended. If requested, the Contractor must provide a detailed explanation of how compliance with Section 508 of the Rehabilitation Act is achieved and a validation of concept demonstration. (<http://www.section508.gov/>). The requirements of this Paragraph along with the Non-Visual Access to Technology Clause shall be construed to achieve full compliance with the Information Technology Access Act, §§2.2-3500 through 2.2-3504 of the Code of Virginia.

V. **STANDARDS OF CONDUCT:** The work site will be occupied by students and University Personnel during the times work is performed. Contractor and Contractor's personnel shall exercise a particularly high level of discipline, safety and cooperation at all times while on the job

site. The Contractor shall be responsible for controlling employee conduct, for assuring that its employees are not boisterous or rude, and assuring that they are not engaging in any destructive or criminal activity. The Contractor is also responsible for ensuring that its employees do not disturb papers on desks, or open desk drawers, cabinets, or briefcases, or use State phones, and the like, except as authorized.

- W. OWNERSHIP OF INTELLECTUAL PROPERTY: All copyright and patent rights to all papers, reports, forms, materials, creations, or inventions created or developed in the performance of this contract shall become the sole property of the Commonwealth. On request, the contractor shall promptly provide an acknowledgment or assignment in a tangible form satisfactory to the Commonwealth to evidence the Commonwealth's sole ownership of specifically identified intellectual property created or developed in the performance of the contract.

## **IX. METHOD OF PAYMENT**

The contractor will be paid based on invoices submitted in accordance with the solicitation and any negotiations. James Madison University recognizes the importance of expediting the payment process for our vendors and suppliers; we request that our vendors and suppliers enroll in our bank's Comprehensive Payable options: either the Virtual Payables Virtual Card or the PayMode-X electronic deposit (ACH) to your bank account so that future payments are made electronically. Contractors signed up for the Virtual Payables process will receive the benefit of being paid Net 15. Additional information is available online at:

<http://www.jmu.edu/financeoffice/accounting-operations-disbursements/cash-investments/vendor-payment-methods.shtml>

## **X. PRICING SCHEDULE**

The offeror shall provide pricing for all products and services included in proposal indicating one-time and on-going costs. The resulting contract will be cooperative and pricing shall be inclusive for the attached Zone Map, of which JMU falls within Zone 2.

- A. Contractor shall provide a list of all labor category(ies) and the associated hourly rate(s).
- B. Provide costs associated with training services.
- C. Provide costs associated with hosting and data storage services.
- D. Provide all other costs including incidentals, travel, and miscellaneous fees that would apply.

Specify any associated charge card processing fees, if applicable, to be billed to the university.

## **XI. ATTACHMENTS**

Attachment A: Offeror Data Sheet

Attachment B: Small, Women, and Minority-owned Business (SWaM) Utilization Plan

Attachment C: Standard Contract Sample

Attachment D: Zone Map

Attachment E: SWaM Sub-contractor Reporting Template (Separate Excel Attachment)

ATTACHMENT A

OFFEROR DATA SHEET

TO BE COMPLETED BY OFFEROR

1. QUALIFICATIONS OF OFFEROR: Offerors must have the capability and capacity in all respects to fully satisfy the contractual requirements.
2. YEARS IN BUSINESS: Indicate the length of time you have been in business providing these types of goods and services.

Years \_\_\_\_\_ Months \_\_\_\_\_

3. REFERENCES: Indicate below a listing of at least five (5) organizations, either commercial or governmental/educational, that your agency is servicing. Include the name and address of the person the purchasing agency has your permission to contact.

CLIENT	LENGTH OF SERVICE	ADDRESS	CONTACT PERSON/PHONE #
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4. List full names and addresses of Offeror and any branch offices which may be responsible for administering the contract.

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5. RELATIONSHIP WITH THE COMMONWEALTH OF VIRGINIA: Is any member of the firm an employee of the Commonwealth of Virginia who has a personal interest in this contract pursuant to the [CODE OF VIRGINIA](#), SECTION 2.2-3100 – 3131?

YES  NO

IF YES, EXPLAIN: \_\_\_\_\_

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ATTACHMENT B

Small, Women and Minority-owned Businesses (SWaM) Utilization Plan

Offeror Name: \_\_\_\_\_ Preparer Name: \_\_\_\_\_

Date: \_\_\_\_\_

Is your firm a **Small Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes \_\_\_\_\_ No \_\_\_\_\_

If yes, certification number: \_\_\_\_\_ Certification date: \_\_\_\_\_

Is your firm a **Woman-owned Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes \_\_\_\_\_ No \_\_\_\_\_

If yes, certification number: \_\_\_\_\_ Certification date: \_\_\_\_\_

Is your firm a **Minority-Owned Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes \_\_\_\_\_ No \_\_\_\_\_

If yes, certification number: \_\_\_\_\_ Certification date: \_\_\_\_\_

Is your firm a **Micro Business** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes \_\_\_\_\_ No \_\_\_\_\_

If yes, certification number: \_\_\_\_\_ Certification date: \_\_\_\_\_

**Instructions:** *Populate the table below to show your firm's plans for utilization of small, women-owned and minority-owned business enterprises in the performance of the contract. Describe plans to utilize SWAMs businesses as part of joint ventures, partnerships, subcontractors, suppliers, etc.*

**Small Business:** "Small business " means a business, independently owned or operated by one or more persons who are citizens of the United States or non-citizens who are in full compliance with United States immigration law, which, together with affiliates, has 250 or fewer employees, or average annual gross receipts of \$10 million or less averaged over the previous three years.

**Woman-Owned Business Enterprise:** A business concern which is at least 51 percent owned by one or more women who are U.S. citizens or legal resident aliens, or in the case of a corporation, partnership or limited liability company or other entity, at least 51 percent of the equity ownership interest in which is owned by one or more women, and whose management and daily business operations are controlled by one or more of such individuals. **For purposes of the SWAM Program, all certified women-owned businesses are also a small business enterprise.**

**Minority-Owned Business Enterprise:** A business concern which is at least 51 percent owned by one or more minorities or in the case of a corporation, partnership or limited liability company or other entity, at least 51 percent of the equity ownership interest in which is owned by one or more minorities and whose management and daily business operations are controlled by one or more of such individuals. **For purposes of the SWAM Program, all certified minority-owned businesses are also a small business enterprise.**

**Micro Business** is a certified Small Business under the SWaM Program and has no more than twenty-five (25) employees AND no more than \$3 million in average annual revenue over the three-year period prior to their certification.

**All small, women, and minority owned businesses must be certified by the Commonwealth of Virginia Department of Small Business and Supplier Diversity (SBSD) to be counted in the SWAM program. Certification applications are available through SBSDB at 800-223-0671 in Virginia, 804-786-6585 outside Virginia, or online at <http://www.sbsd.virginia.gov/> (Customer Service).**

**RETURN OF THIS PAGE IS REQUIRED**

**ATTACHMENT B (CNT'D)**  
**Small, Women and Minority-owned Businesses (SWaM) Utilization Plan**

Procurement Name and Number: \_\_\_\_\_

Date Form Completed: \_\_\_\_\_

Listing of Sub-Contractors, to include, Small, Woman Owned and Minority Owned Businesses  
 for this Proposal and Subsequent Contract

Offeror / Proposer: \_\_\_\_\_

Firm \_\_\_\_\_ Address \_\_\_\_\_ Contact Person/No. \_\_\_\_\_

Sub-Contractor's Name and Address	Contact Person & Phone Number	SBSD Certification Number	Services or Materials Provided	Total Subcontractor Contract Amount (to include change orders)	Total Dollars Paid Subcontractor to date (to be submitted with request for payment from JMU)

*(Form shall be submitted with proposal and if awarded, a SWaM Sub-contractor Reporting Form shall be submitted to [swamreporting@jmu.edu](mailto:swamreporting@jmu.edu))*

**RETURN OF THIS PAGE IS REQUIRED**

ATTACHMENT C



COMMONWEALTH OF VIRGINIA
STANDARD CONTRACT

Contract No. \_\_\_\_\_

This contract entered into this \_\_\_\_\_ day of \_\_\_\_\_ 20\_\_\_\_, by \_\_\_\_\_ hereinafter called the "Contractor" and Commonwealth of Virginia, James Madison University called the "Purchasing Agency".

WITNESSETH that the Contractor and the Purchasing Agency, in consideration of the mutual covenants, promises and agreements herein contained, agree as follows:

SCOPE OF CONTRACT: The Contractor shall provide the services to the Purchasing Agency as set forth in the Contract Documents.

PERIOD OF PERFORMANCE: From \_\_\_\_\_ through \_\_\_\_\_

The contract documents shall consist of:

- (1) This signed form;
(2) The following portions of the Request for Proposals dated \_\_\_\_\_:
(a) The Statement of Needs,
(b) The General Terms and Conditions,
(c) The Special Terms and Conditions together with any negotiated modifications of those Special Conditions;
(d) List each addendum that may be issued
(3) The Contractor's Proposal dated \_\_\_\_\_ and the following negotiated modification to the Proposal, all of which documents are incorporated herein.
(a) Negotiations summary dated \_\_\_\_\_.

IN WITNESS WHEREOF, the parties have caused this Contract to be duly executed intending to be bound thereby.

CONTRACTOR:

PURCHASING AGENCY:

By: \_\_\_\_\_ (Signature)

By: \_\_\_\_\_ (Signature)

\_\_\_\_\_  
(Printed Name)

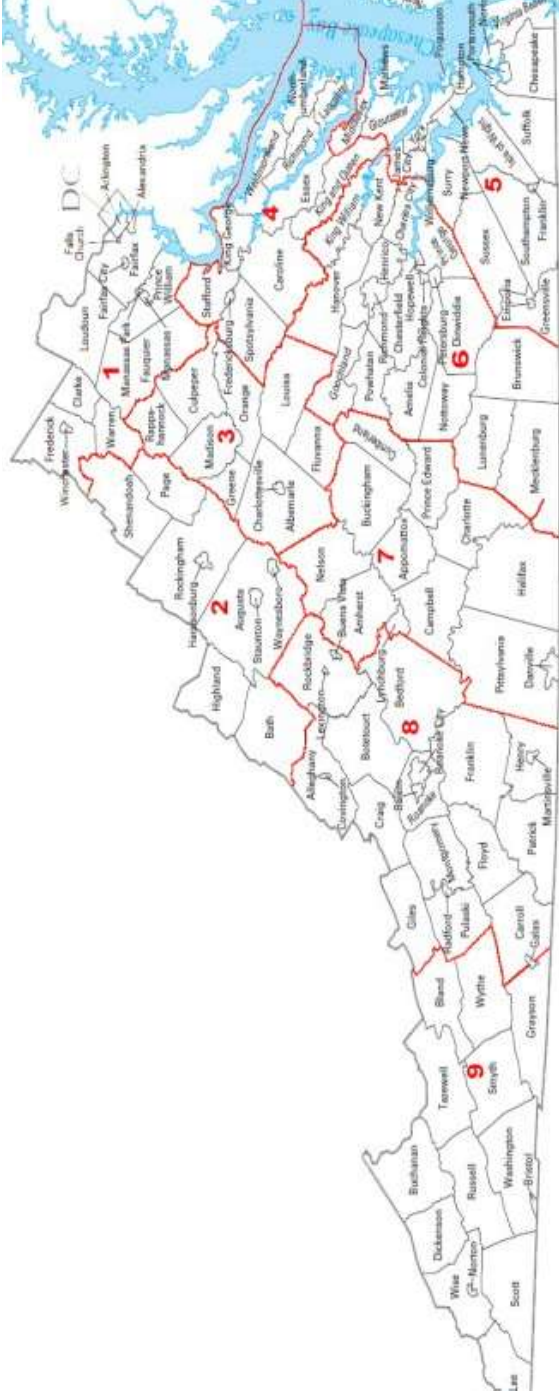
\_\_\_\_\_  
(Printed Name)

Title: \_\_\_\_\_

Title: \_\_\_\_\_

## ATTACHMENT D

### Zone Map



## Virginia Association of State College & University Purchasing Professionals (VASCUPP)

### List of member institutions by zones

<b>Zone 1</b> George Mason University (Fairfax)	<b>Zone 3</b> University of Virginia (Charlottesville)
<b>Zone 4</b> University of Mary Washington (Fredericksburg)	<b>Zone 6</b> Virginia Commonwealth University (Richmond) Virginia State University (Petersburg)
<b>Zone 7</b> Longwood University (Farmville)	<b>Zone 9</b> University of Virginia - Wise (Wise)
<b>Zone 2</b> James Madison University (Harrisonburg)	
<b>Zone 5</b> Christopher Newport University (Newport News) College of William and Mary (Williamsburg) Norfolk State University (Norfolk) Old Dominion University (Norfolk)	
<b>Zone 8</b> Virginia Military Institute (Lexington) Virginia Tech (Blacksburg) Radford University (Radford)	



November 10, 2025

**ADDENDUM NO.: ONE**

**TO ALL OFFERORS:**

**REFERENCE:** Request for Proposal No: **RFP# SLD-1244**  
Dated: **October 28, 2025**  
Commodity: **Digital Strategy, Design, and Engagement Services**  
RFP Closing On: **December 3, 2025 at 2:00 p.m. (Eastern)**

Please note the clarifications and/or changes made on this proposal program:

1. James Madison University will be closed November 24<sup>th</sup> through November 28<sup>th</sup>. For the avoidance of doubt, the last day to submit questions for this RFP will be November 19<sup>th</sup>, by end of day.
2. *Question:* What is the anticipated budget or budget range for this RFP?  
*Answer:* There is no set budget outlined for this solicitation.
3. *Question:* Who is the current vendor providing these services?  
*Answer:* The University awarded a contract to Forum One Communications Corporation in 2019.
4. *Question:* What was the budget for the last two years' expenditures on [www.imdetermined.org](http://www.imdetermined.org)?  
*Answer:* The university is not required to provide budget information, however historical spend can be determined at <https://eva.virginia.gov/>.
5. *Question:* How frequently will JMU issue project requests or purchase orders under the resulting contract?  
*Answer:* This is unknown.
6. *Question:* Is this contract intended specifically for the I'm Determined Center and its digital properties, or will it serve as an on-call agreement available to other JMU departments?  
*Answer:* Any resulting contract(s) will be made available to other JMU departments for use.
7. *Question:* Is the incumbent vendor eligible to bid on this RFP?  
*Answer:* Yes.
8. *Question:* Reference Page 22, Section X, Pricing Schedule. Is there a pricing schedule template to use for the submission? If not, would JMU prefer that the offeror provide their own?

MSC 5720  
752 Ott Street, Room 1042  
Wine Price Building  
Harrisonburg, VA 22807  
Office of  
PROCUREMENT SERVICES 540.568.3145 Phone  
540.568.7935 Fax

*Answer:* The university does not have a pricing template for this RFP. Offerors are responsible for determining the format of their proposal submission, provided it complies with all stated requirements.

9. *Question:* Reference Page 22, Section X, Pricing Schedule, “The resulting contract will be cooperative and pricing shall be inclusive for the attached Zone Map, of JMU falls within Zone 2.” Will other departments at JMU have access to this contracted price list to procure additional products and services outside of the scope of IMD’s requirements?

*Answer:* Yes, other departments at JMU will have access to any resulting contracts and their price lists to procure additional products and services outside of the scope of IMD’s requirements.

10. *Question:* Reference Page 2, Section IV, Statement of Needs. For translation services, which languages are prioritized or most requested by your users?

*Answer:* This will partly be decided by future focus groups and polling to see what translations would be most desired, but at this moment, we anticipate these languages as possibilities: Spanish, Arabic, Kurdish, Korean, Urdu, Vietnamese.

11. *Question:* Reference Page 1, Section II, Background. Confirm that [www.imdetermined.org](http://www.imdetermined.org) is hosted on Pantheon and uses the WordPress Content Management System, version 6.8.

*Answer:* Yes, this is correct.

12. *Question:* Reference Page 1, Section II, Background. Are there existing user personas, journey maps, or UX research findings we can review?

*Answer:* This information is not available.

13. *Question:* Reference Page 2, Section IV, Statement of Needs, Item C, Question 22. Can JMU provide the monthly traffic analytics for users, downloads and pageviews for [www.imdetermined.org](http://www.imdetermined.org) to assist with hosting estimates?

*Answer:* Below are the analytics for the past three (3) months.

August - Unique Users: 7,792 | Views: 29,431 | Downloads: 6,224

September - Unique Users: 8,323 | Views: 27,554 | Downloads: 7,266

October - Unique Users: 9,092 | Views: 27,132 | Downloads: 6,442

14. *Question:* Reference Attachment E. Please confirm Attachment E “SWaM Standard Reporting Template” is to be used after award of a contract and is not part of our proposal submission.

*Answer:* Correct, this template is to be used following any resulting contract awards.

15. *Question:* What content management system and hosting platform currently power [www.imdetermined.org](http://www.imdetermined.org) and will the selected vendor manage ongoing maintenance/hosting, or focus solely on design and engagement updates?

*Answer:* [www.imdetermined.org](http://www.imdetermined.org) uses Pantheon for hosting and WordPress for Content Management. The selected vendor will manage ongoing maintenance/hosting, also focusing on design and engagement updates.

16. *Question:* Is JMU open to evolving or modernizing the I'm Determined brand and its current "space theme", or should updates remain within the existing visual identity?

*Answer:* I'm Determined is not open to evolving the brand but rather looking for new ways to utilize the brand. I'm Determined would prefer to stay true to the current brand as much as possible for the current work and updates should remain within existing visual identity.

17. *Question:* Approximately how many pages, videos, and resources currently exist across the site to be audited for accessibility or translation?

*Answer:* ADA Title II requires all content to be accessible. Part of this process will be going through all existing content and deciding what is not accessible and the level of effort required for each resource. This will allow us to decide what to keep, what to increase accessibility, and what is already meeting the standards. Because this work needs to be completed, it is difficult to approximate quantities needed.

18. *Question:* For new functionality such as interactive showcases, guided learning modules, and utilization maps, does JMU prefer fully web-based modules embedded within the existing site, or modular applications integrated via APIs?

*Answer:* Current web solutions are web-based - Wordpress custom blocks and add-ons. We are open to solutions that are most effective, simple to maintain, and user-friendly, whether they are web-based or modular applications.

19. *Question:* For the guided learning modules, should they support quizzes, progress tracking, or SCORM-compliant content compatible with LMS platforms?

*Answer:* Quizzes and progress tracking are desired, but SCORM compliance is not necessary at this time.

20. *Question:* For the networking solutions, please confirm this refers to web-based collaboration tools (forums, shared calendars, resource sharing) rather than campus IT infrastructure, and indicate whether integration with Canvas, MyMadison, or SSO is expected.

*Answer:* Yes, this refers to web-based solutions. The website is not connected to campus IT infrastructure.

21. *Question:* Beyond WCAG 2.2 AA compliance, does JMU require accessibility validation reports or third-party testing documentation as part of final deliverables?

*Answer:* This is not required but is acceptable to include.

22. *Question:* The RFP mentions potential AI-driven features. Could JMU clarify what use-cases are envisioned (e.g., accessibility enhancement, content personalization, analytics) and any related data-handling restrictions?

*Answer:* This is something that we are not extremely familiar with and were hoping to hear ideas from potential vendors. One possible solution could be something that helps website visitors find what they are looking for by asking questions using natural language instead of a typical search and filter solution. In any case, personal data should not be saved.

23. *Question:* Does JMU expect the selected vendor to assist with long-term content strategy and information architecture (taxonomy, tagging, content governance) as part of the engagement?

*Answer:* Yes.

24. *Question:* Should vendors include options for secure managed hosting and maintenance, or will all hosting remain within JMU's IT infrastructure? If vendor-managed, are there data-sovereignty or backup requirements?

*Answer:* Hosting does not reside on JMU's IT infrastructure, so vendors will be responsible for ensuring a reliable solution.

25. *Question:* How does JMU plan to measure engagement success or learning outcomes, and should vendors include analytics implementation or performance dashboards?

*Answer:* Measuring engagement success/learning outcomes will be discussed with the awarded vendor. Potential vendors should include recommendations for analyzing data to drive decision-making.

Signify receipt of this addendum by initialing "Addendum # 1" on the signature page of your proposal.

Sincerely,



Shanna Devers, CUPO  
Lead Commodity Contract Officer  
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Phone: (540-568-3131)



November 13, 2025

**ADDENDUM NO.: TWO**

**TO ALL OFFERORS:**

**REFERENCE:** Request for Proposal No: **RFP# SLD-1244**  
Dated: **October 28, 2025**  
Commodity: **Digital Strategy, Design, and Engagement Services**  
RFP Closing On: **December 3, 2025 at 2:00 p.m. (Eastern)**

Please note the clarifications and/or changes made on this proposal program:

1. *Question:* Reference Page 2, Section IV Statement of Needs “A solution such as a separate landing page or website for the organization of IMD’s media, including film, educational material, podcasting, and lectures.” Would the vendor need to leverage Cascade as the content management system, or would we be free to propose additional technologies to achieve this goal?

*Answer:* The vendor would leverage features and plugins available in Wordpress. I’m Determined’s website is not part of JMU’s Cascade system.

2. *Question:* Reference Page 1, Section II Background “guided user journeys, educational modules, and better curated resources”. Can you elaborate on whether these should be custom-built solutions, third-party integrations, or if JMU has a preferred technology stack?

*Answer:* Preference would be given to utilize Wordpress features and possibly some third-party integrations. We are not looking for custom-built solutions at this time.

3. *Question:* Reference Page 3, Section IV Statement of Needs, Item C, Number 10 “Describe the documentation offered for University projects.” Are there minimum requirements for documentation quality/format, or does JMU have preferences?

*Answer:* JMU does not have a preference or requirement at this time but is interested to learn what documentation would be available from vendors to support university projects.

4. *Question:* Throughout the RFP, the term “applications” is reference in relation to updates, creation, and support needs. Can you confirm whether “applications” in this context refers specifically to the main website and its associated features, or if it also includes other standalone applications, portals, or custom software?

*Answer:* Yes, this refers to the main website and associated features.

5. *Question:* Reference Page 22, Section X Pricing Schedule. Regarding pricing, since there aren't pre-determined initiatives under the digital strategy, design, and engagement umbrella, can we simply provide you with our labor categories and rates vs pricing out the project?

*Answer:* Yes, vendors should provide pricing with labor categories and rates as indicated in the RFP. Pricing out the project is not required.

6. *Question:* What was the catalyst for this solicitation?

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*Answer:* We are seeking to replace the current contract that has a final expiration date of April 30, 2026.

7. *Question:* Do you have any key metrics/KPI's you are looking to hit? What does success look like?

*Answer:* It is our hope that our audiences will be able to successfully utilize the tools and resources on the website in order to increase opportunities for practicing self-determination skills.

8. *Question:* What is the relationship between JMU and this program?

*Answer:* The I'm Determined Center is headquartered at JMU.

9. *Question:* What are the most common accessibility issues currently encountered?

*Answer:* Currently there are minimal accessibility issues, but the standards are being raised which may have an impact on some of the tools and resources that are currently available on the site.

10. *Question:* Are there specific user personas or audience segments you want to prioritize in the guided journeys and modules?

*Answer:* Our three primary audiences are Youth with disabilities, their Families, and the Educators who support them. Guided journeys and modules will be instrumental in helping any of these audiences get more out of our site and resources.

11. *Question:* What is the expected frequency and format for educator training sessions?

*Answer:* We are hoping to have asynchronous educator training opportunities, guided journeys, and/or modules available when the educator needs them. As educators gain knowledge and begin practicing self-determination skills in their classrooms, they can request our team's services for training and technical assistance. Because it is request-based, there is no set frequency.

12. *Question:* Are there specific security certifications or standards required for hosted applications?

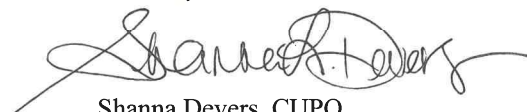
*Answer:* This is unknown.

13. *Question:* Is there a preference for on-premises vs. cloud hosting?

*Answer:* Preference would be cloud hosting, as the Center is not equipped to house hosting servers.

Signify receipt of this addendum by initialing "Addendum # 1" on the signature page of your proposal.

Sincerely,



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November 20, 2025

**ADDENDUM NO.: THREE**

**TO ALL OFFERORS:**

**REFERENCE:** Request for Proposal No: **RFP# SLD-1244**  
Dated: **October 28, 2025**  
Commodity: **Digital Strategy, Design, and Engagement Services**  
RFP Closing On: **December 3, 2025 at 2:00 p.m. (Eastern)**

Please note the clarifications and/or changes made on this proposal program:

1. *Question:* For language translations and multimedia accessibility (captioning, transcripts, etc.) should vendors budget for those services, or will JMU coordinate that internally?

*Answer:* We have handled some of these in-house or with other vendors, as well as utilizing past website vendors for this work. The university is interested in learning what offerors' capabilities are.

2. *Question:* Are the "digital strategy, design, and engagement" services expected to include content production or video/multimedia development, or will the university handle content creation internally?

*Answer:* Content production and development is not included in the expectations of a website vendor and will be handled internally.

3. *Question:* Do you currently have educational courses or materials that would be the basis for digital versions of these modules or will the curricula need to be developed?

*Answer:* The curricula will need to be developed using tools and resources that currently exist on our website.

4. *Question:* What does "exceeding compliance standards" mean to you in terms of accessibility?

*Answer:* Basic compliance often leaves members of our audience out. I'm Determined wishes to be an example of what accessibility *can* be, especially when taking universal design principles into consideration, and the wide range of abilities represented in the disability community. It means that we don't stop at the minimum standards, but instead do what is reasonably within our ability to be sure that anyone wanting to access our content can.

5. *Question:* Are there any custom plugins/modules or themes we should be aware of?

*Answer:* Plugins are used on the site, and custom blocks within a Wordpress theme.

6. *Question:* Do you have documented information architecture (sitemaps, content models) for the current site, or would part of this engagement be to create/refresh that?

*Answer:* No.

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7. *Question:* What analytics tools are currently in use (Google Analytics, Tag Manager, Hotjar, etc)?  
*Answer:* Google Analytics
8. *Question:* Do you already track conversions or key actions (downloads, video views, signups), or is defining those part of the new project?  
*Answer:* We track basics that are included with Google Analytics.
9. *Question:* Has any accessibility or usability testing been done recently for the site?  
*Answer:* Accessibility is reviewed for all new content developed for the site, however some legacy resources need accessibility updates.
10. *Question:* Are there specific requirements for implementing complex User Roles or Content Approval Workflows within WordPress?  
*Answer:* No.
11. *Question:* Are there specific requirements for the number or type of custom page templates (beyond standard WordPress capabilities) that need to be developed or maintained?  
*Answer:* No.
12. *Question:* Is there a requirement to integrate or maintain a Staff Directory or a Faculty Directory function within the website?  
*Answer:* Yes, our team directory is part of the site and we would like this maintained.
13. *Question:* Are there requirements for specific content editing features or tools beyond the native WordPress editing environment?  
*Answer:* No.
14. *Question:* Does the current or future scope of work require management or display functionality for center or campus Events? If so, what level of Calendar integration is necessary?  
*Answer:* We currently display events as their own detail pages with no calendar integration.
15. *Question:* Is a specific feature set required to ensure optimal Printer Friendly Pages for resources or educational content?  
*Answer:* No.
16. *Question:* Please confirm if responsive design (ensuring optimal viewing across all devices) is a mandatory requirement for all new design work and enhancements.  
*Answer:* Yes, responsive design is necessary.
17. *Question:* Will the Offeror be responsible for creating or maintaining a user-facing sitemap and/or ensuring the optimization of XML sitemaps for search engines?  
*Answer:* This is unknown.

18. *Question:* Does the Center require assistance or specifications regarding the integration and configuration of Google Analytics or other web analytics tools?

*Answer:* The university is open to recommendations.

19. *Question:* Are there specific form building tools or integration requirements (beyond standard WordPress plugins) for data collection and submission?

*Answer:* No.

20. *Question:* Is there a need for integration with a help desk or support Ticketing system?

*Answer:* No.

21. *Question:* Since security requirements for hosted applications are unknown, what is the required Service Level Agreement (SLA) uptime guarantee percentage for the proposed cloud hosted environment?

*Answer:* This is unknown.

22. *Question:* While Digital Strategy services are requested, are there explicit expectations or deliverables related to Search Engine Optimization (SEO) implementation or Search Engine Marketing (SEM)/Promotion strategy?

*Answer:* No.

Signify receipt of this addendum by initialing “*Addendum # 3*” on the signature page of your proposal.

Sincerely,



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