



COMMONWEALTH OF VIRGINIA
STANDARD CONTRACT

Contract No. UCPJMU5374

This contract entered into this 29th day of November 2018, by T-Base Communications USA, Inc., 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 November 29, 2018 through November 28, 2019 with four one-year renewal options.

The contract documents shall consist of:

- (1) This signed form;
(2) The following portions of the Request for Proposal FDC-1017 dated July 19, 2018:
(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 1, dated August 8, 2018,
(e) Addendum 2, dated August 14, 2018.
(3) The Contractor's Proposal dated August 8, 2018 and the following negotiated modification to the Proposal, all of which documents are incorporated herein.
(a) Negotiations Summary, dated November 28, 2018.

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

CONTRACTOR:
By: [Signature]
(Bruce Moszczyk)
(Bruce Moszczyk)
(President)

PURCHASING AGENCY:
By: [Signature]
(Doug Cester)
(Doug Cester)
(Buyer Senior)



RFP # FDC-1017 Braille Transcription Service
Negotiation Summary for T-Base Communications USA, Inc.
November 28, 2018

- Contractor’s pricing schedule for the Purchasing Agency is as follows and hereby replaces the Pricing Schedule listed in the Contractor’s proposal dated August 14, 2018:

PRICING SCHEDULE

Transcription Fees (per page)	<u>Level 1</u>	<u>Level 2</u>	<u>Level 3</u>
EBAE Braille Literary	\$5.00	\$6.25	\$7.50
Nemeth Braille	\$7.50	\$7.50	\$7.50
UEB Technical	\$7.50	\$7.50	\$7.50
UEB Literary	\$6.25	\$7.00	\$7.50
UEB with Nemeth	\$7.50	\$7.50	\$7.50
Foreign Language Braille (EBAE or UEB)	\$7.50	\$8.50	\$9.50
Tactile Graphics (Swell Touch) Creation	\$12.50	\$12.50	\$12.50

Above pricing assumes receipt of extractable electronic files, add \$3.00 per output page if not

Level 1 - The document is written in plain language, has no visual elements, such as charts, tables or illustrations and uses simple numbering systems, if any.

Level 2 - The document requires modification involving: re-creation of essential visual images as text, incorporation of footnotes and sidebars into narrative text and re-configuration of nested numbering systems.

Level 3 - The document requires further modification involving: incorporation of page cross-references in the text, incorporation of basic charts, graphs and tables as narrative.

Production Fees

Braille Paper	\$0.30	per page
Thermofom (Swell Touch) Pages - Copies	\$4.00	per page
Large Print Paper	\$0.25	per page
Cover Page	\$0.40	per page
Cerlox for braille; After 15 sheets	\$4.00	per volume
Spiral for Large Print; After 20 sheets	\$4.50	per volume
CD including labels	\$6.00	per CD

Notes:

- All page pricing is based on output page
- Shipping is charged as a pass-through cost
- All pricing is in USD

Additional services available:

Service	Detail	Cost
Web Accessibility Audit	High-level audit (~7 days)	\$8,400.00
	Detailed audit (~15 days)	\$18,000.00

Note: The cost can be tailored depending on the size, complexity and number of landing pages in the organization’s website portfolio.



**RFP # FDC-1017 Braille Transcription Service
 Negotiation Summary for T-Base Communications USA, Inc.
 November 28, 2018**

Document Remediation (PDF/UA)	Simple, formatted 10-page document (3-5 business days). Larger and more complex documents will be quoted based on an hourly rate of \$75.00 per hour.	\$150.00* per document
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*Based on the complexity and length of the document. Charts, images and graphs requiring additional tagging increase the complexity of the document.

Web Accessibility Training	Full-day training	\$4,500.00
Accessible PDF& Office	Half-day training	\$3,500.00
Document Training	Full-day training	\$4,500.00*

*Full-day course recommended. It is also recommend providing T-Base with sample organization documents for customization and use as examples during training.

Accessibility Awareness Training	Half-day training	\$3,500.00
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Notes:

Travel & living expenses not included

Customization for training is available at an additional cost of \$1,200/day

Training is provided onsite and for groups of 10-12 people

2. Contractor’s proposal dated August 8, 2018 is hereby amended as follows:
 - a. Contractor shall enroll to receive electronic payment for James Madison University prior to invoicing the University for services provided under this contract.
 - b. Contractor shall bill per job for all services rendered.

3. Should travel be required during the term of this contract, all travel expenses shall be in accordance with the U.S. General Services Administration (GSA) allowance for lodging, meals, and incidentals.

<http://www.gsa.gov/portal/content/104877>

<http://www.gsa.gov/portal/content/101518>

4. Contractor has disclosed all potential fees. Additional charges will not be accepted.



Response to James Madison University's RFP #FDC-1017 - *Braille Transcription Services*

COPY

Submitted to:

Commonwealth of Virginia
James Madison University
Procurement Services MSC 5720
752 Ott Street, Wine Price Building
First Floor, Suite 1023
Harrisonburg, VA 22807

Submitted by:

T-Base Communications USA, Inc.
806 Commerce Park Dr.
Ogdensburg, NY 13669
Jeff Jullion
jjullion@tbase.com
1-800-563-0668

REQUEST FOR PROPOSAL
RFP# FDC-1017

Issue Date: July 19, 2018

Title: Braille Transcription 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 August 15, 2018 for Furnishing The Services Described Herein.

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

All Inquiries For Information And Clarification Should Be Directed To: Doug Chester, Buyer Senior, Procurement Services, chestefd@jmu.edu; 540-568-4272; (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:

<u>T-Base Communications USA, Inc.</u> <u>806 Commerce Park Dr., Ogdensburg, NY</u> <u>13669, U.S.</u>	By: <u>Please see original for signature.</u> <i>(Signature in Ink)</i> Name: <u>Bruce Moszczelt</u> <i>(Please Print)</i> Title: <u>President</u> Phone: <u>800-563-0668 ext. 1267</u> Fax #: <u>315-713-0061</u>
Date: <u>Aug. 8, 2018</u>	
Web Address: <u>https://www.tbase.com</u>	
Email: <u>info@tbase.com</u>	

ACKNOWLEDGE RECEIPT OF ADDENDUM: #1 _____ #2 _____ #3 _____ #4 _____ #5 _____ (please initial)
Please see original for 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.

August 8, 2018

Commonwealth of Virginia
James Madison University
Procurement Services MSC 5720
752 Ott Street, Wine Price Building
First Floor, Suite 1023
Harrisonburg, VA 22807

Attn: Doug Chester

T-Base Communications USA, Inc. ("T-Base") is pleased to provide the following response to the Request for Proposal issued by James Madison University ("JMU"), RFP No. FDC-1017 - *Braille Transcription Services*.

T-Base is North America's leader in the design, production and secure delivery of accessible information to end-users who are blind, have low vision or are print-restricted. We help you communicate effectively with students who cannot access information in conventional print or online formats, while ensuring your full compliance with accessibility legislation. We provide document accessibility services (e.g. document remediation, accessibility training and consulting) to facilitate compliance with the Americans with Disabilities Act (ADA) and Section 508 of the Rehabilitation Act. In addition, we design, produce and deliver textbooks, statements and documents in a wide range of alternate formats, including but not limited to braille, large print, e-Text, accessible PDF and audio.

T-Base also provides web accessibility and remediation services, including Impact Analysis Reports and remediation support, to ensure our clients are in compliance with the Web Content Accessibility Guidelines (WCAG) 2.0 Level AA.

In recent years, T-Base has provided braille transcription of instructional material for universities and colleges across North America and for four of the five largest Departments of Education in the United States. We are confident we have the qualifications, expertise and experience necessary to meet and exceed the requirements of JMU.

With decades of experience, equipped with robust corporate standards and working in state-of-the-art, secure production facilities, the T-Base team is dedicated to ensuring we meet your high expectations and exacting requirements. Our Board of Directors, Executive Management Team and trained, certified and experienced staff members are committed to ensuring delivery of the most cost-effective accessible braille transcription services in the marketplace.

We look forward to our involvement in JMU's evaluation and selection process.

Sincerely,

Please see original for signature.

Bruce Moszcelt

President

bmoszcelt@tbase.com | 800-563-0668

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Statement of Understanding

T-Base Communications understands that the JMU's Office of Disability Services ("ODS") is looking for an outside contractor that can support the braille program with both standard and specialized braille codes. We understand that the contractor must be capable and experienced in producing tactile graphics and braille for students with vision impairments enrolled in a variety of classes, including STEM subjects, phonetics, anatomy, foreign languages and more. We understand that the number of students requiring braille and tactile materials has increased, and we are confident in our capability to meet the demand. T-Base has resources proficient in transcribing instructional material into pre-UEB (EBAE), Nemeth (including chemistry and spatial-mathematics) and foreign languages. T-Base also has resources highly skilled and experienced in the production of tactile graphics. We have rigorous processes for transcription and proofreading and are experts in interpreting Braille Authority of North America ("BANA") standards and codes.

This proposal is organized in the manner requested by JMU in RFP #FDC-1017 under 3. Proposal Preparation, section C.

A. Production

T-Base Communications has been producing braille for over 20 years. We regularly receive feedback from our customers (and, in turn, their consumers/ end-users), attesting to the quality of our production.

T-Base amplifies its expertise and maintains a prominent leadership position through its professional affiliations. We are also proud to be the first privately held alternate format company to be accepted as an associate member of BANA. As a member of BANA, T-Base is in a unique position to ensure complete compliance with the standards that govern the production of braille for JMU.

It is important to note that our document conversion engine is designed to meet BANA standards and is regularly updated as standards evolve. This unique platform was designed specifically to meet the high-capacity batch conversion required by our clients. This platform is capable of supporting various foreign languages with Romanized characters (e.g. English, French and Spanish), formats (contracted and uncontracted braille) and codes (e.g. pre-UEB (EBAE), UEB and Nemeth).

1. Experience producing braille types

English Braille American Edition (EBAE)/ Pre-UEB braille

T-Base has years of experience transcribing material using EBAE and all of the accompanying codes, including the following:

- Braille Formats: Principles of Print-to-Braille Transcription, 2011
- Nemeth Code for Mathematics & Science Notation, 1972, 2007 Revision.

Cont'd: 1. Experience producing braille types

- Braille Code for Chemical Notation, 1997
- Guidelines and Standards for Tactile Graphics, 2010
- Interim Manual for Foreign Language Guidelines
- Computer Braille Code Revised 2000

Unified English Braille (UEB)

T-Base has been adhering to UEB standards since 2014. We have vast knowledge of this code as well as the following:

- Braille Formats: Principles of Print-to-Braille Transcription, 2016
- The Rules of Unified English Braille
- UEB Guidelines for Technical Materials
- Provisional Guidance for Transcribing Foreign Language Material in UEB
- Guidance for Transcription Using the Nemeth Code within UEB Contexts
- Provisional Guidance for Chemistry Notation Using Nemeth in UEB Contexts
- Guidelines and Standards for Tactile Graphics, 2010

Nemeth for STEM subjects

T-Base uses Nemeth Code to transcribe STEM subjects (e.g. math, spatial mathematics and chemistry). T-Base has several certified Nemeth transcribers on staff with many years of experience transcribing a wide range of instructional material—textbooks, course packs, workbooks, tests, etc.—into Nemeth braille. Our standard transcription approach (section 7. of **A. Production**) applies for this type of transcription work. Please see **C. Quality Control** for more on our certified transcribers and Appendix Two for proof of Nemeth and Mathematics Braille certifications.

Notably, T-Base can now produce high-quality Nemeth textbooks (math and chemistry) ranging in complexity 2x faster with use of an automated software solution called FASTtrack. Please see **B. Timelines** for full details.

Foreign languages**For Foreign Languages in EBAE:**

For the purposes of agencies and transcribers working with BANA codes, any language other than modern English is considered a foreign language. Foreign language words or phrases within an English language paragraph are contracted as though they are English with the exception that a contraction is not used when an accented letter is part of a contraction.

Cont'd: 1. Experience producing braille types

We have extensive experience transcribing French Braille using the *Code pour la transcription en Braille de l'imprimé*.

For Foreign Languages in UEB

T-Base employs the following methods for transcription of foreign languages in UEB:

- Method 1. UEB Accents and Contractions in Anglicized Words
- Method 2. UEB Accented Letters and Uncontracted Words
- Method 3. Using Foreign Language Signs for Accented Letters

Phonetics/IPA

Although T-Base is well-versed on Phonetics/IPA transcription, it is not a service we currently offer; therefore, we will not be bidding on this braille type. This is reflected in our pricing proposal.

Tactile Graphics

T-Base is fortunate to have Aquinas Pather, the Chairperson of BANA's Tactile Graphics Technical Committee, as our lead Tactile Graphic Artist. Aquinas has over 20 years' experience in tactile graphic design and is a well-regarded expert in the field. T-Base expertise provides customer-specific scripting for all aspects of tactile production, including layout and design, braille quality and adherence to BANA standards and pre-UEB (EBAE) or UEB Code.

Our braille is specifically designed to meet applicable guidelines and standards. We adhere to BANA's *Braille Formats Principles of Print-to-Braille Transcription*, 2016.

We comply with all braille code updates:

- The Rules of Unified English Braille Second Edition 2013 for Literary instructional material;
- Guidance for Transcription Using the Nemeth Code within UEB Contexts, approved June 2016 for instructional material that is technical in nature;
- Guidelines and Standards for Tactile Graphics, 2010; and
- Promising Practices for Transcribing Early Literacy Textbooks Kindergarten, First, Second and Third Grades.

T-Base is capable of producing tactile graphics for a wide range of grade levels, from elementary and early learning to post-secondary with advanced technical materials for all STEM subjects.

2. Types of tactile graphics T-Base produces

The following are types of tactile graphics T-Base can produce.

1. **Microcapsule Paper**, also known as Swell Touch tactile graphics.
 - a. **11.5" X 11" standard braille paper**
 - i. As standalone items (e.g. brochures, logos, presentation slides, etc.)
 - ii. As inserts to braille volumes (e.g. textbooks for mathematics and science or literary texts as well as for standardized tests)
 - iii. As tactile graphics supplementary volumes to accompany braille volumes or e-text (e.g. graphics for online material request or if tactile graphics supplements are requested)
 - b. **11.5" X 11" with fold-out pages for larger pages within**
 - i. As inserts for braille volumes (e.g. large floor plans, a periodic chart of the elements, etc.)
 - ii. As inserts to supplementary braille volumes
 - c. **Letter size pages**
 - i. As standalone items
 - d. **11" X 17" (large tactile pages)**
 - i. As standalone items (e.g. floor plans for orientation and mobility purposes)
 - ii. As large charts or tables if requested
2. **Tiger Embossed** graphics
 - a. **11.5" X 11" standard braille paper**
 - i. As inserts to braille volumes (e.g. textbooks for mathematics and science or literary texts)
 - ii. As tactile graphics supplements to accompany braille volumes (e.g. graphics for online material request or if tactile graphics supplements are requested)
 - b. **Letter size pages**
 - i. As standalone items (upon request)

T-Base recommends Swell Touch graphics over Tiger embossed graphics, which have a limited range of resolution and tactile representation when compared to Swell Touch. Swell Touch provides greater distinction between area textures, point symbols and line styles and overall, provides superior readability for the user.

3. **Thermography**

Given the need for confidentiality outlined in R. Confidentiality of Personally Identifiable Information under VIII. Special Terms and Conditions, T-Base will produce *all* JMU materials *in-house*. T-Base is capable of producing tactile graphics that can be embossed using Thermography. However, T-Base does not own the specialized machinery required to produce tactiles in Thermography format. In our view, Thermography reproduction is cost prohibitive in relation to the very limited use cases in which Thermography provides additional clarity to blind and low vision end users. T-Base recommends Swell Touch embossed tactiles as the best solution for JMU in terms of user satisfaction, cost effectiveness and production turnaround.

3. Methods of printing

T-Base Communications is running well within its maximum designed capacity and will be able to fulfil its delivery commitments to JMU from existing full-time resources.

T-Base has been in the business of high-volume production for over two decades, and has developed processes and planning methods that ensure optimized resource allocation. We operate two high-capacity production facilities, each capable of operating 24 hours a day, seven days a week, with industry leading embossing and tactile capacity.

Because our processing platform for receiving, converting and delivering documents has been designed to scale, we can easily generate and translate or transcribe large volumes of documents based on existing technology and processes. Our New York State facility currently supports several large-scale education customers.

T-Base annually reviews its current capacity against anticipated peaks and forecast demand. At this time, we are working at 70% of facility capacity, 65% of braille equipment capacity and 80% of personnel capacity (which reflects our steady state, providing built-in ability to respond to periodic volume peaks). T-Base employs a mandatory cross-training process to ensure all personnel can be fully utilized based on service requirements. Fully cross-trained employees allow T-Base to manage short-term fluctuations in work.

Dedication to constant capacity and demand forecasting, combined with workflows designed for scalability, ensures our ability to accommodate drastic volume fluctuations. Typically, transcription work is cyclical in nature with turnaround times that integrate well with our more predictable monthly statement business, allowing us to maintain overall capacity.

Our facilities each have a dedicated Production Manager working under the supervision of the CIO and Director of Production Services as well as the Chief Operating Officer. The Operations and Production Teams meet weekly to forecast incoming volume and allocate resources for the production period ahead.

Operations and Account Executives review customer accounts monthly to forecast demand coming from sales activities and to ensure sufficient capacity is available for all anticipated volume. Both groups utilize online workflow management and resource allocation tools to provide support and visibility across the organization.

T-Base currently transcribes approximately 5 million original braille pages per year. Depending on contract volume and turnaround requirements, transcription is completed either manually by individual transcribers or via FASTtrack (i.e. guided transcription) software developed and owned by T-Base.

The following is a list of the braille embossing equipment available for the production of braille instructional material for JMU.

Cont'd: 3. Methods of printing

Equipment	Count	Image
Enabling Technologies Express 150's	13	
Enabling Technologies Express 100	1	
Enabling Technologies Bookmaker	3	
Enabling Technologies Juliet's	5	
Braillo 650 SW	2	
Index Braille Everest-D V4	1	
VP Elite by ViewPlus	2	
Variety of Cerlox Machines from Southwest Binding Systems		
Total Embossing Equipment	27	

T-Base has built its core braille production capacity to meet on-demand embossing requirements in the financial services and education markets, typically producing several thousand individual braille packages on a monthly basis. Machine redundancy and immediate, high-quality, braille turnaround is central to our business model and pivotal to our success as North America's leader in the design, production and delivery of high-quality braille and tactile graphics.

4. Materials used to produce tactile graphics

T-Base uses primarily Microcapsule Paper (Swell Paper) and computer braille paper (Tiger Embossed braille) to produce tactile graphics.

5. Additional accessibility services T-Base offers

T-Base offers several accessibility-related services besides the production of braille and tactile graphics:

- Alternate format transcription of textbooks, workbooks, course packs, standardized tests and other instructional material for customers in education, including: e-Text, HTML, MathML, audio, accessible PDF, EPUB and large print (either reflowed or enlarged).
- Accessible PDF remediation
- Accessible PDF training
- Website & mobile app accessibility audits
- Website accessibility training
- Accessibility awareness training for customer service representatives

6. Ability to deliver materials electronically

T-Base provides various options for the delivery of final work; how we deliver depends on customer preference. Digital files (such as .brf and .dpx files for completed braille) are typically delivered by email with an email-embedded packing slip generated through our JIRA ticketing and order tracking system. T-Base can also provide secure delivery of more sensitive documents through a T-Base-hosted Secure FTP site, with dual authentication requirements.

T-Base is extremely flexible in that we accept source files and can deliver output in a variety of file formats.

7. Step-by-step process to produce a complete textbook (STEM included)

The *entire* process—from quote to delivery—can be separated into four key phases:

1. Receipt of Instructional Materials and Document Preparation
2. Preparation and Review
3. Transcription
4. Delivery/Invoicing

Phase 1: Receipt of Instructional Materials and Document Preparation

Once initial contact is made by JMU, T-Base will acknowledge receipt of the document(s) received as a hard copy or digital file from JMU to create a work order in our workflow management system. The T-Base Project Manager will then assess requirements with the assigned Formatter along with the

Cont'd: 7. Step-by-step process to produce a complete textbook (STEM included)

transcription and proofing team to determine the appropriate time required to complete the transcription work. Once the Project Manager is in receipt of the source documents, the delivery date, format information, and delivery information, they will log all necessary details in T-Base's workflow system and determine delivery schedules.

Phase 2: Preparation and Review

Once the length of time to transcribe the material provided by JMU is determined and it is confirmed that it will be done within JMU's timeframe, a quote is prepared based on existing contractual agreements, indicating the cost to transcribe materials and turnaround time to complete the work. Once JMU agrees with the completion deadline proposed and agrees to the work order, transcription work commences.

Phase 3: Transcription

The transcription process of JMU instructional materials will be managed in our internal project management system, in which the project is entered and tracked through all stages, including shipping of transcribed materials. Information is entered into the tracking system and is shared only with the project team assigned to the customer's transcription documents.

Phase 4: Delivery/Invoicing

Delivery dates are tracked within T-Base's project management system. Once work is completed and shipped/delivered, an invoice is sent to JMU adhering to the invoicing requirements established in RFP #FDC-1017, section G. Submission of Invoices and section J. Payment.

Hard copy is typically shipped on two-day ground service with delivery tracking, using either FEDEX or UPS, as appropriate. Priority overnight shipment is also available when necessitated by short turnaround requirements.

Following is an overview of the four stages of document preparation in the Transcription process (Phase #3). For any given document, our skilled Transcription Specialists are assigned specific roles according to the following process.

Formatting/Document Preparation

The Formatter is responsible for preparing an input file for the transcription process. T-Base can be provided with a text-extractable digital file, such as a rich text file (.rtf), or a print copy. (Ideally, a PDF version is also provided.) If the source documents received are either hard copy or image-based files, the documents are scanned and processed using Optical Character Recognition (OCR) software. The output is then meticulously compared to the original by a second team member to ensure accuracy and completeness of this document. If

Cont'd: 7. Step-by-step process to produce a complete textbook (STEM included)

the source files received are electronic and text-extractable, then tools are used to streamline the document and prepare it for the transcription stage.

The Formatter will be a unique resource from the Proofreader role and will provide instructions to the Transcriber, Graphic Artist and Proofer as well as confer with you to determine which graphics require descriptive text or tactile creation. The Formatter will also review the completed braille volumes to ensure all applicable standards are followed. The Formatter will then advise the Transcriber should any additional changes be required.

Transcription and Tactile Graphics

The Workflow order determines which Transcription Specialist is assigned the role of Transcriber. The Transcriber will be a unique resource from the Proofreader role and will work collaboratively with the Formatter, Graphic Artist and Proofer to ensure that the project is completed accurately and to your satisfaction.

The transcription process is fundamental to the overall work product, as it is at this stage that the source document is transformed into the required braille format. The Transcriber will apply the appropriate tools to transform the source document, generating an output directly from the validated input. It is at this stage that the document passes on to the proofing stage, prior to production (output to physical braille format).

The Transcriber will follow the Formatter's instructions and transcribe materials following applicable BANA, pre-UEB (EBAE) or UEB standards. The Transcriber will follow all instructions to produce the volumes and will insert the electronic tactiles received by the Graphic Artist. The Transcriber will review the completed volumes before sending to the Formatter and Proofer. Should any corrections be necessary based on the Formatter and Proofer's notes, the Transcriber will do so as directed by the Formatter and/or Proofer.

Along with the Transcriber, the Graphic Artist will confer with the Formatter in order to determine which graphics require descriptive text or tactiles to properly convey educational concepts. The Graphic Artist will produce braille tactile graphics in the size required by the Formatter as per applicable specifications. The Graphic Artist will work with the Transcriber to determine proper formatting of the braille copy and will send the electronic file of the work to the Proofer. Should the Proofer require additional corrections, the Graphic Artist will complete them and send the completed electronic tactile graphics to the Transcriber for insertion by volume.

Cont'd: 7. Step-by-step process to produce a complete textbook (STEM included)

Proofing and Quality Assurance

T-Base places highest priority on proofing and quality assurance, as it is this crucial stage that ultimately detects any defects that may have been introduced in either the formatting/preparation or transcription stage. The Proofer, by policy and process design, **MUST** and **WILL** be a distinct role (and individual) from the Formatter, Transcriber and Graphic Artist. The proofing process comprises a word-by-word, line-by-line, read through of the transcription output, comparing it for quality and accuracy relative to the original source document. Subsequent to the first proof, a final quality assurance review is conducted by a braille subject matter expert. This additional quality assurance process ensures that the proper standards and format were applied to the document and are consistent with T-Base and JMU expectations for quality.

The Proofer will be provided the original textbook or document along with the Formatter's instructions and marked-up copy. The proofer will read through all the transcribed work and collaborate with the Transcriber to resolve any discrepancies. The Proofer will verify that all changes have been made, review the braille volumes and provide the Transcriber with a signed copy of the completed Proofer's notes.

Production

At this stage, there is a final quality assurance step. The fully proofed document is passed from proofing to production for rendering into final physical braille format or other alternate/accessible formats. In the case of braille textbooks, production quality assurance ensures the quality of braille (dot integrity, no punch through or erasures leaving tactile impression, etc.) as well as the accuracy of braille alignment and margins. Production is also responsible for meeting the specific deadlines for shipment of materials to either the customer or end-users

B. Timelines

1. Typical turnaround time for a standard braille production request

T-Base requires an electronic file (e.g. NIMAS, PDF, Excel, Word, etc.) that is extractable (i.e. not password protected). We do accept a hardcopy document/textbook if an electronic source file cannot be provided, but we prefer to have an electronic file for faster turnaround. Multiple columns in a given textbook may increase the number of braille pages and time to complete and prepare braille files; however, generally speaking:

Cont'd: 1. Typical turnaround time for a standard braille production request

- An exam/test (Literary or Nemeth) can be completed and returned to the school within 4-5 business days.
- A request for EBAE Literary up to approx. 200 pages can be completed within 10-11 business days.
- A request for Nemeth or Technical with approx. 300 pages and a small number of tactile graphics can be completed within 25-35 days.

For every request, T-Base will provide JMU with the best possible delivery timeline based on current scheduling.

If provided a syllabus, T-Base will try to schedule textbooks prior to being reviewed in class. This helps ensure students who are blind or have low vision have what they need in order to participate with their peers who are sighted.

Manual vs Automated Transcription

Our manual production capacity is highly scalable; however, we prefer to automate transcription in as many cases as possible. We use proprietary software called "FASTtrack" to streamline transcription (a typically arduous, manual process). With FASTtrack, transcription is guided and 2x faster without compromising quality. While the process is more automated, with use of this software, appropriately certified transcribers perform Quality Assurance (QA) and ensure all applicable standards are met.

This process is not easily replicated in the marketplace, and we are confident that our investment in this automated process will greatly benefit JMU. T-Base can deliver high-quality braille materials for even the most complex subject matter *2x faster than industry standards* —including highly complex instructional materials alongside world-class tactile graphics.

T-Base is particularly experienced in managing deliverables for the education market. We understand and appreciate the requirement for turnaround schedules that coincide with educational curricula. Our automated transcription processes, coupled with our project management methodologies, allow for effective planning and ensure scalability.

2. Necessary timeframes for a braille production request with short or quick turnaround:

T-Base can prepare and emboss braille at a rapid rate using FASTtrack. We can turnaround a short exam (1-30 pages) with less than six simple tactile graphics within approx. 5 days of the request.

The delivery timeline for tactile graphics depends largely on the level of complexity and the number of tactile graphics required. We have prepared complex 3D tactile graphics (Basic Anatomy) and can provide samples should JMU express an interest.

Cont'd: 2. Necessary timeframes for a braille production request with short or quick turnaround:

Additional information on T-Base timeframes for braille transcription services:

Any Work Plan prepared for our braille transcription process, begins with the initial contact from JMU: JMU will provide Jeff Jullion, Senior Account Manager, with specifications. Jeff is responsible for delivering high-quality braille materials and tactile graphics that meet all JMU's technical requirements. Jeff will work closely with T-Base Transcription, QA and Production managers to do so.

After an award win, T-Base will initiate a kickoff meeting by video conference or on site, if deemed appropriate, with JMU to review details of this project.

- T-Base will develop an *Agency Decisions* document to record all JMU's preferences. This document will be sent to JMU for review and approval.
- JMU Coordinator contacts T-Base and provides electronic files to get a quote for the transcription.
- Within 5 days, T-Base confirms transcriber availability and provides a tentative timeline for delivery. If the work is urgent, a breakdown by chapters (or several chapters) will be suggested with delivery timelines for each section.
- Within 5 days, JMU approves the quote with the timelines provided and ships a hard copy of the print book to T-Base.
- T-Base assigns the book to a transcriber to start the transcription. A tactile artist is also assigned to the project to work in conjunction with the transcriber. The transcriber has overall responsibility for the completeness and correctness of the braille and tactile graphics to be inserted within the braille volumes.
- As the volumes are ready, the transcribed volumes and tactile graphics are proofread and proofer's notes are created for correction of the braille and tactile graphics.
- Within 2 weeks of the due date, the Quality Assurance (QA) team checks all braille volumes and delivers electronic file(s) to JMU once QA has passed.
- Within 2 to 5 days of the due date, the braille and tactile graphic file(s) are provided to the Production team for embossing and assembly of braille volumes and tactile graphics.
- By the due date, assembled braille volumes are shipped by courier as overnight shipping to JMU.

C. Quality Control

1. Quality control processes and procedures

T-Base has invested heavily in its quality assurance program. Quality is an integral part of every process at T-Base Communications and is one of our key corporate objectives. This commitment to excellence is required of every employee, regardless of his or her job, and our employees understand the importance of accuracy and timeliness to both our customers and the end-user. We are fully committed to taking all measures necessary to achieve a 100% quality standard. Our processes and methodologies are designed to ensure the highest degree of usability, readability and quality of output materials for students who are blind, have low vision or are print-restricted.

Our quality assurance team has invested considerable time reviewing current processes and improving performance to ensure that user requirements are met. T-Base provides all transcribers with *Agency Decisions*. Included in *Agency Decisions* are instructions for the transcription of material assigned by T-Base customers (i.e. customer-specific requirements for braille and tactile graphics). The reference manual is authored by our in-house Transcription & Tactile Graphics Design Specialist under the supervision of our Director of Transcription Services. *Agency Decisions* will be based on requirements provided by the JMU.

T-Base uses a priority job ticket tracking system (JIRA) that tracks all documents through all phases of the project lifecycle. T-Base employs subject matter experts who follow industry standards and apply extensive proofing and quality assurance protocols to ensure we exceed our high standards for accuracy and on-time delivery.

In a case that we do not meet this measure, T-Base requires a root-cause analysis as to reasons for the performance deficiency and follows up with the Transcriber for corrective measures and enhancements without deviating from the delivery schedule. Quality assurance is monitored at the executive management level on an ongoing basis. The T-Base Executive Management Team includes the Co-CEOs, the Chief Operating Officer, the Chief Information Officer and Director of Production, the Director of Transcription Services and the Director of Human Resources. Suggestions for improvement and new processes are documented within the JIRA system and tracked for effectiveness.

We have formally established work instructions to ensure the proper procedures are followed and apply internal audit processes to ensure full compliance with work instructions. Upon receipt of the source documents, the project manager logs the delivery date, format information, and delivery information in our workflow system. Delivery schedules are determined at this time.

Transcribers are unable to modify any applicable tools or software themselves, ensuring tight upgrade policies and processes. This is important, as consistency of software is critical in the transcription and proofing stages.

Cont'd: 1. Quality control processes and procedures

T-Base will establish formal work instructions for your instructional materials to ensure we follow procedures and product specifications specific to JMU. Our workflow system ensures all individuals working on the file are logged in, have the appropriate qualifications to conduct the specific work, and the same person does not perform consecutive work validation (i.e. a person cannot proof their own work).

The transcription processes at T-Base have been refined over years of experience serving hundreds of customers, and we are fully confident that they will serve JMU well. Our incident and error reporting records are reviewed on an ongoing basis by Executive Management, and are formally presented to our Board of Directors on a quarterly basis, ensuring and fostering a company culture dedicated to high-quality service. For the step-by-step transcription process and more on the key role quality assurance plays in this process, please see section 7. of **A. Production** in this proposal.

Regarding quality control in production specifically (i.e. quality control post-transcription), T-Base adheres to a rigorous document preparation and production process that ensures output is accurate and of superior quality. T-Base's production process has been refined over decades of experience and hundreds of customers who require high-quality braille communications.

To ensure error-free delivery, T-Base places highest priority on the proofing stage in production as well, as it is this crucial stage that ultimately detects any defects. Just as we have a Proofer during the transcription process, we have a Proofer during the production process. This Proofer inspects the braille output to ensure all JMU requirements are met and that output is of the highest degree of quality. The Proofer, by policy and process design, **MUST** not be the person who assembled the product. The Proofer ensures each & every volume produced

- complies with JMU specifications
- is proofread against the original to ensure accuracy of transcription

In the case of braille textbooks, production quality assurance ensures the quality of braille (dot integrity, no punch through, etc.) as well as the accuracy of braille alignment and margins. Final textbooks are bound; a cover page and a braille label are included.

Escalation Process

A formal escalation process is in place and provides full escalation and emergency coverage during off hours to support any critical issues, 24 hours per day - seven days a week. Authorized users and contacts will be specified within the contract, and strictly enforced via standard T-Base business processes. Correspondence can be accepted during these hours via phone, fax or email, as agreed with the JMU.

Cont'd: 1. Quality control processes and procedures

About our escalation process: All reported problems are acknowledged and a trouble ticket is issued within one hour. Remedial work begins within four hours and issues are typically resolved within 24 hours, with complete resolution within 72 hours. If an issue is escalated by JMU, JMU will be issued, by email, a resolution status and ticket number. You can subsequently query the status of an issue by referencing the issued ticket number via primary or back-up contact.

Any issues raised by JMU not resolved to satisfaction through normal interaction with the T-Base Senior Account Manager/Contract Representative will be escalated to T-Base's Escalation Response Team, which includes the Co-CEOs, Chief Operating Officer, Chief Information Officer and Director of Production, Director of Transcription Services and the Director of Human Resources.

2. Qualifications/certifications of the staff performing the quality control/proofing:

T-Base Communications has a roster of braille transcription specialists certified through either the Library of Congress/National Library Services (NLS) or through the Canadian National Institute for the Blind (CNIB)—considered equivalent by the National Federation for the Blind (NFB). Please see Appendix Two for the Equivalency Letter and all transcriber certifications.

Below is a brief introduction to T-Base certified transcribers and personnel who will play an integral role in the printing of braille and tactile graphics for JMU.

Kim Engle, Transcription Specialist

Credentials: *Mathematics Braille Transcription, UEB Update, Braille Formats, Principals of Print-to-Braille Transcription*

Kim Engle has exceptional experience working in the transcription of mathematics for both K-12 and post-secondary material. She has applied her knowledge to projects in which complex Nemeth transcription and complete accuracy is required. Kim has over 11 years of experience as a transcriber. For JMU, Kim will be a certified Literary and Nemeth braille transcriber and will ensure all braille materials meet BANA's current standards.

LaVerne Blaasse, Transcription Specialist

Credentials: *Literary Braille Transcriber, UEB Update*

Laverne Blaasse is an experienced transcriber with over three years' experience working on a variety of projects for T-Base, specifically in Literary braille (in both EBAE and UEB), and six years' transcription experience in total.

Jessica Blouin, Transcription Manager

Credentials: *Literary Braille Transcription Certificate, Nemeth Certification, UEB Braille Certification*

Cont'd: 2. Qualifications/certifications of the staff performing the quality control/ proofing:

As the Transcription Manager, Jessica is responsible for the day-to-day management, direction and coordination of transcribers and subject matter experts. She also participates in the Quality Assurance of completed transcription delivered by outsourced transcribers or internal guided transcription operators. In addition, Jessica is responsible for applying JMU's requirements throughout the transcription process. She formats and processes the document for encoding in all formats and in both official languages, according to all applicable standards. She provides transcriber's notes according to BANA and will communicate with JMU on any and all changes that are required in the documents. Jessica is also responsible for the proofing, production and assembling of the final product. Jessica is a certified Literary and Nemeth braille transcriber and will ensure all braille materials for JMU meet current BANA, pre-UEB (EBAE) and UEB standards.

Aquinas Pather, Transcription & Tactile Graphics Design Specialist

Credentials: *Literary Braille Transcription Certificate, Tactile Graphics Instruction, UEB Braille Certification*

Aquinas is our Lead Transcriptionist with over 20 years of experience in tactile graphic design, editing, and instructional experience. Aquinas is an integral part of the quality assurance process. He guides the activities of the team of transcriptionists, providing verification on customer-specific scripting for all aspects of braille products, including layout and design, braille quality and adherence to BANA standards, pre-UEB (EBAE) and UEB Code. JMU will benefit greatly from Aquinas' expertise, as he will ensure all braille materials produced meet BANA standards. In addition to being a member of the Tactile Graphics Committee for International Council for English Braille (ICEB), he possesses certifications as a Designer in Tactile Graphics, Tactile Graphics Instructor, and Literary Braille Transcription. He has co-authored the BANA Guidelines and Standards for Tactile Graphics, 2010. Aquinas is also the Chairperson of BANA's Tactile Graphics Technical Committee. Aquinas is a certified Literary braille transcriber and tactile graphics specialist and will ensure all braille materials produced for JMU meet current BANA, pre-UEB (EBAE) and UEB standards.

Jeremy Milks - Processing and Secure Transcription Manager

Credentials: *Literary Braille Transcription Certificate, UEB Braille Certification*

Jeremy has been a transcription specialist with T-Base since 2007. He is responsible for proofreading, transcribing, editing, and converting various forms of documents and textbooks in braille, large print, e-Text and accessible PDF. Jeremy organizes different projects that ensure that all braille documents meet BANA standards and UEB Code by following T-Base's internal proofing procedures and he also works with any special requirements set forth by the

Cont'd: 2. Qualifications/certifications of the staff performing the quality control/ proofing:

customer. Jeremy has obtained BANA certification and holds a Literary Braille Transcription Certificate from CNIB.

Liza Ontong - Transcription Specialist

Credentials: *Literary Braille Transcription Certificate, UEB Braille Certification*

Liza Ontong, a transcription specialist at T-Base since 2011, ensures educational materials are properly transcribed into braille according to BANA standards and either pre-UEB (EBAE) or UEB code. Her transcription work is proofed through T-Base's internal proofing procedures and will follow any special requirements set forth by JMU.

Lyne Therrien - Transcription Specialist

Credentials: *Literary Braille Transcription Certificate*

Lyne is responsible for the transcription of source material into braille, which involves scanning, Optical Character Recognition (OCR), formatting and proofreading. Lyne also adapts tactile images to braille using Corel Draw.

Sailaja Hathaway – Transcription Specialist

Credentials: *Braille Transcription, Transcriber of Mathematics Braille*

Sailaja transcribes source material into braille. She is responsible for the quality assurance and proof reading of braille received from other transcribers. She makes corrections in braille and Corel Draw according to braille formatting rules and regulations.

Anthony Rybka - U.S. Manager, Production

Anthony Rybka, with T-Base since December 2010, is Production Manager at the U.S. facility. Anthony is responsible for daily print production, document reproduction, packaging and shipment of alternate formats for T-Base customers. Anthony has an extensive understanding of SLA requirements for all customers and ensures that all materials produced meet the needs of the customer and applicable document production standards. Anthony communicates the status of projects with members of all departments involved. He stays up to date with applicable best practices and consistently applies those while producing alternate formats for T-Base customers. Anthony oversees the embossing process and will ensure output meets all JMU requirements.

Shona Wall – U.S. Manager, Quality Assurance

Shona Wall has worked for T-Base for over eight years and is currently managing the Quality Assurance team at our U.S. production facility to ensure that applicable standards are met on all

Cont'd: 2. Qualifications/certifications of the staff performing the quality control/ proofing:

projects. Shona continues to update her education to ensure T-Base remains the leader in our industry with a strong focus on customer satisfaction and service.

Barb Austin – QA and Transcription Specialist

***Credentials:** ADA Coordinator*

Barb Austin has worked for T-Base for over eight years and has held various positions—in processing, QA and transcription. Barb is currently working on her BANA Braille Certification with the Library of Congress and is a certified ADA Coordinator with certification through the University of Missouri College, Human and Environmental Sciences, School of Architectural Studies and the Great Plains ADA Center. Barb will be focused on final quality assurance for all braille and tactile graphics for JMU.

Sommer Friot - Manager, Processing and Production

***Credentials:** ADA Coordinator*

Sommer has worked with T-Base for over 10 years and currently oversees and manages all aspects of production and processing at the T-Base U.S. facility. Sommer is heavily involved in our quality assurance program ensuring high-quality output material is delivered to customers in a timely fashion. Sommer has completed the ADA Coordinator Training Certification Program (ACTCP) through the University of Missouri College, Human and Environmental Sciences, School of Architectural Studies and the Great Plains ADA Center.

Please refer to Appendix One for resumes and Appendix Two for proof of certification.

3. Role of certified transcribers in regards to production and quality control

T-Base certified transcribers play a significant role in production and quality control. It is their responsibility to proof all transcribed material, regardless of whether transcription was manual or automated (via FASTtrack). Our certified transcribers ensure that all output (either electronic or hard copy) meets T-Base & JMU standards for quality, accurately reflects the original/ input and adheres to the appropriate braille code (as determined by content type and customer preference). Please see section 7. Of **A. Production** for the complete transcription process, including QA & proofing.

4. Processes by which edits can be requested

All electronic and hard copy master files, as well as files at various stages of the process, are securely retained within a comprehensive Work Flow Management tool deployed within T-Base's secure infrastructure. This ensures that if edits are required at any time, changes can be made at the best point in the process to guarantee the highest integrity of the information.

Cont'd: 4. Processes by which edits can be requested

All files that are maintained in the system are backed up nightly, into offsite secure storage, to ensure availability in the unlikely event of a system failure.

D. Experiences and References**1. Experience working with educational institutions**

T-Base has significant experience working with private and public sector educational enterprises. We produce accessible PDF, e-Text, EPUB, audio, braille and large print (both reflowed and enlarged) for many universities, colleges and departments of education across North America, as well as standardized testing and assessment material. We produce and deliver *all* types of instructional material (e.g. textbooks, workbooks, course packs, certificates and tests) in alternate formats.

Our roster of customers in the education market include large organizations and institutions such as California Department of Education (CDE), Connecticut Department of Rehabilitation Services (DORS), Ohio State University, Wayne State University, Harvard University, The University of Colorado – Colorado Springs, University of Illinois, University of Texas at Austin, Front Range Community College, Texas Education Agency, The College Board, the Education Quality and Accountability Office (EQAO) and many others.

Secure Standardized Testing in Alternate Formats

T-Base works on behalf of North America's largest financial institutions to process private banking and investor statements under a secure infrastructure. Under the same secure infrastructure, we produce accessible standardized tests and report cards for individual schools, school boards and ministries or departments of education.

2. References

For your convenience, we have included the five references from *Attachment A – Offeror Data Sheet* below along with a brief description of the service we provided each.

Reference #1

Client: New York State Education Department (NYSED)

Length of service: January 1, 2017 – Ongoing

Address: New York State Education Department, 89 Washington Avenue, Albany, New York 12234

Contact person: Lisa DeSantis, Manager

Number: (585) 343-5384 ext. 207

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Description: New York State has 7,000 public and private elementary and secondary schools. For NYSED, T-Base transcribes and produces textbooks and other educational materials in braille and

Cont'd: 2. References

large print (blow up & reflow) to provide for its students who are blind or have low vision in New York State (NYS). T-Base has a five-year contract to deliver approx. half of a million braille output pages for K-12 textbooks varying in complexity from literary to STEM in both electronic and hard copy with a turnaround of 20 to 90 days. Source files vary from PDFs, NIMAS or hard copy and are converted into the students' desired formats.

T-Base has worked creatively with NYSED to provide solutions for various challenges. T-Base has received a variety of materials from NYSED ranging in quality, and we have made every effort to ensure proper braille transcription regardless of input format.

Reference #2

Client: California Department of Education (CDE)

Length of service: 2010 – Ongoing

Address: 1430 N Street, Sacramento, California 95814-5901

Contact person: Gloria Dobson, Curriculum Frameworks & Instructional Resources Division – Associate Governmental Programs Analyst

Number: (916) 319-0628

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Description: The California Department of Education (CDE) oversees funding and testing and holds local educational agencies accountable for student achievement in 1,037 districts, 10,170 public schools, and 985 charter schools in California serving 6,287,834 students. T-Base has been transcribing textbooks into braille, with tactile graphics, since 2010 for students at K-12 institutions within CDE. We have transcribed textbooks and other instructional materials in UEB, uncontracted braille, contracted braille and Nemeth (for mathematics and science materials, which include tactile graphics). Orders come from CDE in batches of 10-25 textbooks; we are then given a three-month turnaround time to complete the transcription and provide the final braille files to CDE. We provide CDE with braille transcription of textbooks and instructional materials on an as-needed basis.

Reference #3

Client: Texas Education Agency

Length of service: 2015 – Ongoing

Address: Purchasing, Contracts and Agency Services Division, Texas Education Agency, 1701 N. Congress Ave., Rm. 2-125, Austin, TX, 78701-1494

Contact person: Debbie Gonzales, Accessible Instructional Materials Coordinator, Instructional Materials Division

Number: 512-463-9601

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Description: T-Base is the provider of K-8 social studies and now CTE textbooks in braille for Texas Education Agency (TEA). As part of the contract for Social Studies, which commenced in 2015, T-Base

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Cont'd: 2. References

transcribed almost one hundred social studies textbooks, primarily over the course of 8 months but delivering as books were completed leading up to the 2016 school year. Textbooks were produced in uncontracted and contracted braille, including all tactiles, typically on a 90-day turnaround. The total number of input pages to be transcribed was 70,000 which totaled 209,000 braille pages and 22,000 tactiles. T-Base coordinated the work of over 30 certified transcribers in order to meet this exceptionally high volume requirement. Bi-Weekly tracking sheets were sent to advise TEA of the status of each book. Given the exceptionally high volume requirement and certain delivery sequencing requirements, in which delivery of some textbooks required prior delivery of other parent textbooks, delivering all titles within 90 days proved challenging. T-Base worked closely with TEA to identify delivery priorities to ensure no student was adversely impacted. We were also selected as a vendor for the production of master accessible digital files (Contract #3694) and the production of braille copy materials for TEA.

Reference #4

Client: Duke University**Length of service:** December 2016 – Ongoing**Address:** 100 Fuqua Drive, Box 90120, Durham, North Carolina 27708**Contact person:** Rebecca McMillan, Assistive Technology and Case Management Coordinator**Number:** (919) 668-1267

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Description: For Duke University, T-Base produces braille, accessible PDF, tactile graphics (Swell Touch). We have transcribed a wide range of instructional material into alternate formats for students at Duke University who are blind or have low vision, including the following: textbooks, class notes, PowerPoint slides, marketing documents (e.g. welcome package, school map, etc.).

Reference #5

Client: University of North Texas**Length of service:** Annually, September 2016 to August 2017**Address:** 1155 Union Circle Denton, Texas, 76203**Contact person:** Rebecca Cagle, Assistive Technology Coordinator Student Services Coordinator**Number:** (940) 565-4323

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Description: We provide transcription service in various formats (large print, accessible PDF/Word, MathML (HTML), braille, Music braille electronic files, tactile graphics). University of North Texas ("UNT") is in the process of updating its website and accessibility to course material/textbooks. We have supplied large print, accessible Word, braille textbook material and accessible PDF forms for UNT. We have been working with the school to improve their access to various formats so that they can

Cont'd: 2. References

meet student needs more quickly. The school uses braille more than any other format but is promoting additional electronic formats (e.g. accessible Word/large print) to speed up delivery of material and reduce transcription costs.

3. Additional information providing insight into T-Base's ability to meet JMU's needs**Company Background**

T-Base is North America's go-to accessible communications company and industry thought leader, and has been for two decades. We provide communications that are fully accessible and compliant with legislation for our customers' end-users who are blind or have low vision. We simplify accessible communications by providing the secure design, production and delivery of textbooks, statements and documents in alternate formats: braille, reflowed large print, e-Text, accessible PDF, audio and EPUB. We also offer online solutions such as PDF/UA remediation, website and mobile app accessibility audits and accessibility training.

We have key customers across a wide range of industries: education, financial services, telecommunications, government and healthcare. We are successful because of the following:

- Commitment to quality
- Investment in technology and our people
- Adherence to the highest security standards in the industry
- Unparalleled customer service
- Efficient transcription and proofreading processes

We invest in customer account management and relationship marketing to ensure long-lasting customer relationships. We also invest in innovation and technology to ensure we are able to deliver the most cost-effective solutions in the marketplace. Our customers view us as a highly credible and capable supplier, and our organization and staff members are fundamental in maintaining and enhancing this view.

In addition to our commitment to *quality* (described in section **C. Quality Control**) and *speed* (described in section **B. Timelines**), our success to date has been driven by the following factors:

Customer Relationships

T-Base is seen as a trusted, reliable partner who saves money and reduces corporate risk. We are an expert partner that ensures our customers communicate effectively with their end-users who are blind, have low vision or are print-restricted, and are at all times compliant with applicable legislation.

Cont'd: 3. Additional information providing insight into T-Base's ability to meet JMU's needs

Our account management team and our customer relationships are a competitive advantage for T-Base.

Continued Innovation

In an effort to drive ever-greater efficiency into our production, and in order to ensure we offer the broadest range of input and output formats in the alternate format industry, we continue to innovate. We are proud to have a team of nine full-time software developers on hand to assist in innovation for both our software-based transformation solutions as well as our product offerings. T-Base will work directly with your organization to ensure your information and communication vehicles are compliant with legislative requirements pertaining to content in accessible formats.

Accuracy and Timeliness

Our business processes and quality control (processes and people) are fundamental to our success. As with security and privacy, our deliverables must adhere to the same standards of accuracy and turnaround time as conventional online communications, and we are proud of our track record. Our investment in people, training, and state-of-the-art production processes, along with a culture of continuous improvement, ensures that we maintain a high level of performance in this area.

Customer Account Management

T-Base focuses intensely on customer service. After careful recruiting and vetting to ensure the best available resources, we invest to ensure that our people are well trained and fully equipped to meet and exceed the expectations of our customers. We also invest in customer account and project management. We dedicate professional customer relationship managers to key accounts in order to ensure complete customer satisfaction and long-lasting customer relationships.

For all projects, regardless of size and scope, T-Base has developed a well-documented and proven phased project management approach with a single point of accountability. We empower our project managers with the resources to take whatever actions are required to meet our customers' needs.

T-Base will assign key personnel who will closely monitor the contract, be knowledgeable of all contractual requirements and respond to JMU within 48 hours. Key personnel that will be specifically assigned to JMU include the Senior Account Manager, the Chief Operating Officer, the Director of Transcription Services, and the Guided Transcription Manager (serving as the Project Manager). Please see below for an introduction to each and Appendix One for their resumes.

Jeff Jullion, Senior Account Manager, Education

Jeff serves as the primary point of contact for T-Base customers in the education industry. As such, he is responsible for all communications, consultation and additional project enhancements for customer

Cont'd: 3. Additional information providing insight into T-Base's ability to meet JMU's needs

contracts. For JMU, Jeff will be the Single Point of Contact: He will keep track of all work in progress and advise JMU on the status of their projects in a timely manner. Jeff will be available to answer any question that may arise and guide JMU through the transcription process.

Jeff specializes in assisting customers in K-12, post-secondary and publishing by way of delivering instructional materials and/or standardized testing in braille, large print, e-Text, EPUB, accessible PDF, MathML, audio and online formats.

Mike Hadfield, Chief Operating Officer

Over the course of the last decade, Mike has held senior management roles in the reprographics and document management industries, bringing extensive experience to both the client relations and operations side of the business. Mike's expertise in building customer loyalty in the legal and financial industries is an asset to T-Base and the complete customer experience. As the Chief Operating Officer, Mike is responsible for the secure statement, document processing and transcription operations at T-Base facilities in both Canada and the United States. He ensures all employees and processes reflect T-Base's unparalleled standards for quality, accuracy and timeliness.

Diane Goyette, Director of Transcription Services

Diane will lead and oversee the team of subject matter experts/ certified braille transcription specialists responsible for JMU's braille transcription and tactile graphics. Diane ensures that final quality assurance is complete on all alternative format documents and that output meets standards and best practices for all customer work. Notably, Diane was instrumental in developing the standards around FASTtrack digital delivery in terms of quality and turnaround for the transcription team and continually works to improve the process.

Mariah Ahmad, Guided Transcription Manager

Mariah Ahmad has worked for T-Base for several years; first, in the processing department, then in project coordination. Mariah's focus as the Guided Transcription Manager is timely delivery, budget management, and ensuring customer satisfaction for each project. Mariah uses the T-Base in-house project-tracking software (JIRA) to manage a myriad of project types, deadlines, input and output quantities, while ensuring our in-house standards are maintained for all projects. For JMU, Mariah will be assigned project manager.

Security

T-Base Communications offers a secure processing and management system for enhanced integrity, availability and confidentiality of all customer data. Our highly scalable, secure technology and

Cont'd: 3. Additional information providing insight into T-Base's ability to meet JMU's needs

processes meet the alternate format production requirements of our demanding roster of Fortune 500 companies and satisfy their compliance officers.

Service delivery from T-Base substantially mitigates any potential risk, as data security is our primary concern. Not only are we HIPAA compliant, but we are also the first alternate format company to be third-party certified under as compliant with both the Payment Card Industry Data Security Standard (PCI-DSS) and SSAE-16 SOC2 Type 2. This provides a level of security that ensures all customers and, in turn, their end-users are protected and that data is never compromised.

Our processes and facilities are subject to rigorous audits from expert groups within many of our customers, and we benefit greatly from this. Having acted on input from the audit results and our own resources over our many years in operation, the result is a company that routinely surpasses security and operational inspection without any recorded deficiencies or notes.

T-Base understands JMU's need for assurance that data obtained (i.e. personal facts and circumstances related to faculty, staff, students and affiliates) will be collected and held confidential. We have read and will comply with all requirements for utilizing, accessing or storing personally identifiable information, under R. Confidentiality of Personally Identifiable Information, VIII. Special Terms and Conditions.

Acknowledgements

- T-Base acknowledges that at the time of bid submission on Aug. 9, 2018, there was one (1) addendum (acknowledged as well on the RFP Cover Sheet as required).
- T-Base acknowledges that we have had \$0 in sales during the last twelve months with each VASCUPP Member Institution.
- T-Base acknowledges that although we have submitted *Attachment B – Small Business Subcontracting Response* as required, we will **not** be utilizing Department of Small Business and Supplier Diversity (SBSD)-certified small businesses. **The transcription of braille is highly specialized work; T-Base is only comfortable carrying out braille and tactile graphic production in-house.**
- T-Base acknowledges that we are fully capable of and experienced in carrying out the activities outlined under **IV. Statement of Needs.**
- T-Base acknowledges that we have read thoroughly and are in agreement with **VII. General Terms and Conditions** and **VIII. Special Terms and Conditions.**
- T-Base acknowledges that we have read and will comply with the insurance requirements under this solicitation.
- T-Base acknowledges that JMU may want to inspect our facilities prior to award to satisfy questions regarding our capabilities. We welcome the opportunity to host your visit.

Appendix One: Resumes

Statement of Qualifications

Jeff Jullion Senior Account Manager, Education

Summary

Jeff serves as the primary point of contact for T-Base customers in the education industry. As such, he is responsible for all communications, consultation and additional project enhancements for customer contracts. He keeps track of all work in progress and advises customers as to the status of their projects in a timely manner. Jeff specializes in assisting customers (in K-12, post-secondary and publishing) by way of delivering instructional materials and/or standardized testing in braille, large print, e-Text, EPUB, accessible PDF, MathML, audio and online formats.

Jeff joined T-Base Communications in 2006.

Credentials

- Studied Business Administration at Algonquin College
- Member of the Center for Accessible Materials Innovation (CAMI) task force

Areas of Expertise

- Accessibility products and services
- Building customer relationships

Experience

T-Base Communications, 2007 – present Senior Account Manager, Education

T-Base Communications, 2006 - 2007 Sales Specialist

Project Work

- California Department of Education – Math and English Language Arts textbooks in braille
- Texas Education Agency – textbooks in braille
- New York State Education Department (NYSED) – textbooks in braille and large print
- AERO – textbooks for elementary and post-secondary schools in braille, accessible math, DAISY and e-Text
- PARCC – standardized testing
- EQAO – standardized testing

Statement of Qualifications

Jeff Jullion *Senior Account Manager, Education*

- D&H – student loans

Statement of Qualifications

Mike Hadfield Chief Operating Officer

Summary

Over the course of the last decade, Mike has held senior management roles in the reprographics and document management industries, bringing extensive experience to both the client relations and operations side of the business. Mike's expertise in building customer loyalty in the legal and financial industries is an asset to T-Base and the complete customer experience. As the Chief Operating Officer, Mike is responsible for the secure statement, document processing and transcription operations at T-Base facilities in both Canada and the United States. He ensures all employees and processes reflect T-Base's unparalleled standards for quality, accuracy and timeliness.

Mike joined T-Base Communications in 2013.

Credentials

- McGill University, Bachelor of Laws, 2000
- University of Toronto, Bachelor of Arts (High Distinction), 1996

Areas of Expertise

- People, process and project management
- Business development
- Contract negotiation

Experience

T-Base Communications, 2018 - present	Chief Operating Officer
T-Base Communications, 2013 to 2018	Director of Operations
ARC Digital Canada Corp, 2006 – 2012	Regional Sales Manager Toronto Operations Manager Divisional Premier Accounts Executive
Astley Gilbert Limited, 2003 – 2006	Branch Manager
Fiery Dragon Productions Inc., 2001 – 2002	Intellectual Property Consultant
Sui & Company, Solicitors 2000 – 2001	Student-at-Law

Project Work

SIMPLIFYING ACCESSIBLE COMMUNICATIONS.™

info@tbase.com | www.tbase.com | Toll-free: 1-800-563-0668

Statement of Qualifications

Mike Hadfield *Chief Operating Officer*

- Expansion of secure transcription and automated statement processing in Canada and the U.S.
- Managed completion of next generation statement processing software (ADOCs)
- Expansion of textbook transcription capacity
- Expansion of T-Base transcription vendor network
- FASTtrack project (automated transcription guided by in-house subject matter experts)

Statement of Qualifications

Diane Goyette *Director, Transcription Services*

Summary

Diane leads a team of certified subject matter experts responsible for the transcription and final quality assurance on all alternative format documents according to standards and best practices for all customer work. She was instrumental in developing the standards around FASTtrack digital delivery in terms of quality and turnaround for the transcription team and continually makes improvements to the process.

Diane joined T-Base Communications in 2014.

Credentials

- Computer Programmer Analyst Diploma (with Honours), CDI College, 1998
- PMP Exam Prep, Summit Project Management Inc.

Areas of Expertise

- Quality assurance
- Building collaborative relationships
- Diagnostic information gathering
- People, process and project management

Experience

T-Base Communications, 2018 - present	Director, Transcription Services
T-Base Communications, 2014 - 2018	Senior Manager of Transcription and Quality Assurance
Bell Canada, 2013 - 2014	Senior Project Manager, Security Operations and Service Delivery
Safenet Inc., 1997 to 2013	Business Operations Manager Senior Program Manager

Project Work

- Library of Congress (LOC):
 - Manages the day-to-day operation for the transcription and timely delivery of various magazines and a weekly journal
 - Point of contact for customers seeking contract clarifications and remediation
- California Department of Education:

Statement of Qualifications

Diane Goyette Director, Transcription Services

- Manages the day-to-day operation for the transcription and timely delivery of educational material
- Point of contact for accepting new material and scheduling its transcription and delivery
- Smarter Balanced:
 - Point of contact
 - Reviews incoming work and creates Agency Decisions

Statement of Qualifications

Mariah Ahmad Manager, Guided Transcription

Summary

Mariah Ahmad has worked for T-Base for several years; first, in the processing department, then in project coordination. Mariah's focus as the Manager of Guided Transcription is the timely delivery, budget management, and ensuring customer satisfaction for each individual project. Mariah uses the T-Base in-house project-tracking software (JIRA) to manage a myriad of project types, deadlines, input and output quantities, while ensuring our in-house standards are maintained for all projects.

Mariah joined T-Base Communications in 2013.

Credentials

- Skilled in Microsoft Office applications, training and development processes, report generation and analysis.

Areas of Expertise

- Project management/coordination
- Software testing/verification
- Quality assurance

Experience

T-Base Communications, 2017 to present Manager, Guided Transcription

T-Base Communications, 2013 – present Project Coordinator

Project Work

- Managing the team responsible for using and testing propriety software to create documents usable by consumers who are blind or low vision.
- Citi Deferred Promo (August 2016 – Present)
- California State Transcription Orders (August 2015 – Present)
- New York State Transcription Orders (May 2017-Present)
- United Bank of Switzerland Automated Customer Set Up (July 2017-October 2017)

Statement of Qualifications

Kim Engle Transcription Specialist

Summary

Kim Engle has exceptional experience working in the transcription of mathematics for both K-12 and post-secondary material. She has applied her knowledge to projects in which complex Nemeth transcription and complete accuracy is required. Kim has over 11 years of experience as a braille transcriber.

Credentials

- Mathematics Braille Transcription
- UEB Update Certification, Library of Congress
- Braille Formats, Principals of Print-to-Braille Transcription

Areas of Expertise

- Braille Transcription
- Tactile representation

Experience

T-Base Communications, 2015 – present	Transcription Specialist
Spokane School District 81, 2006 – 2008	Office Manager, Braille Transcriber
Lilac Services for the Blind (8 years)	Volunteer
Various organizations, including APH & local/state institutions (5 years)	Contract Braille Transcriber

Project Work

- California Department of Education – Transcription Specialist and Internal Auditor
- Texas Education Agency – Transcription Specialist and Internal Auditor
- Department of Treasury (IRS) – Transcription Specialist and Internal Auditor
- New York State Education Department (NYSED) – Transcription Specialist and Internal Auditor

Statement of Qualifications

LaVerne Blaasse Transcription Specialist

Summary

LaVerne Blaasse is an experienced transcriber with over three years' experience working on a variety of projects for T-Base, specifically in Literary braille (both EBAE and UEB). Laverne has six years' transcription experience in total.

Credentials

- Braille Transcriber Certification, Library of Congress, 2013
- UEB Update Certification, CNIB, 2015
- UEB Proficiency Letter, Library of Congress, 2016

Areas of Expertise

- Braille transcription
- Tactile representation

Experience

T-Base Communications, 2014 – present Transcription Specialist

Project Work

- California Department of Education – Transcription Specialist and Internal Auditor
- Texas Education Agency – Transcription Specialist and Internal Auditor
- Department of Treasury (IRS) – Transcription Specialist and Internal Auditor
- New York State Education Department (NYSED) – Transcription Specialist and Internal Auditor

Statement of Qualifications

Jessica Blouin Manager, Transcription

Summary

In her role as Transcription Manager, Jessica is responsible for the overall day-to-day management, direction and coordination of transcribers and subject matter experts. She also participates in the Quality Assurance of completed transcription delivered by outsourced transcribers or internal guided transcription operators.

Jessica joined T-Base Communications in 2008.

Credentials

- Literary Braille Transcription Certificate, CNIB, 2012
- UEB Update Certification, CNIB, 2014
- Braille Mathematics Transcription Certificate, CNIB, 2015

Areas of Expertise

- Transcription
- People, Process and Project Management

Experience

T-Base Communications, 2017 – present	Manager, Transcription
T-Base Communications, 2008 – 2017	Transcription Specialist and Team Lead
T-Base Communications, 2010 – 2013	Internal Auditor

Project Work

- California Department of Education – Transcription Specialist and Internal Auditor
- EQAO – Transcription Specialist and Internal Auditor
- Texas Education Agency – Transcription Specialist and Internal Auditor

Statement of Qualifications

Aquinas Pather Tactile Graphics and Transcription Specialist

Summary

As the Tactile Graphics and Transcription Specialist, Aquinas advises T-Base on matters related to tactile graphics and on braille code in regards to BANA standards and UEB. He also trains and mentors transcribers on tactile graphics design. He participates in customer meetings, manages tactile production and represents T-Base on the BANA tactile graphics technical committee. Aquinas provides ongoing consultation to the T-Base software development team on braille formatting.

Aquinas joined T-Base Communications in 2009.

Credentials

- Chairperson, BANA Tactile Graphics Technical Committee, ongoing
- Member of the Tactile Graphics Committee for International Council for English Braille (ICEB)
- Publications:
 - *The Innovative Use of Vector-based Tactile Graphics Design Software to Automate the Production of Raised-line Tactile Graphics in Accordance with BANA's Newly Adopted Guidelines and Standards for Tactile Graphics*, Journal of Blindness Innovation & Research 2014, Vol. 4 Issue 1
- Peer Reviewer for the Journal for Visual Impairment and Blindness, American Foundation for the Blind
- Currently serving on the Braille Literacy Canada (BLC) Web Committee
- Currently serving (as an Observer) on the UEB Code Maintenance Committee (CMC)
- Tactile Graphics Designer, CNIB, 1994
- Tactile Graphics Instructor, CNIB, 2001
- Braille Literary Transcription, CNIB, 1994
- UEB Update Certification, CNIB, 2014
- National Federation of the Blind, Certification Equivalency Letter for Braille transcribers and proofreaders in literary, mathematics and music braille, 2011

Areas of Expertise

- Tactile graphics design and instruction
- Braille transcription

Experience

Statement of Qualifications

Aquinas Pather Tactile Graphics and Transcription Specialist

T-Base Communications - 2010 - present Tactile Graphics and Transcription Specialist

Canadian National Institute for the Blind –
1993 – 2006 Tactile Graphics Designer/Instructor

Project Work

- Create and QA Braille and Tactile Graphics for Textbook Transcription and other projects
- Created the tactile graphics samples for the upgrade to the Chemistry Code for BANA's Nemeth with in UEB guidance materials
- Provide advice and assistance to international web-based forum of Tactile Graphics Designers using CorelDraw to produce CGI (Computer Generated Image) tactile graphics
- Currently serve as Chair to the BANA Tactile Graphics Technical Committee – tasked to update the tactile graphics materials to align with Unified English Braille (UEB) Code.
- Presented at major Canadian conferences (CNIB Braille Conference Toronto between 2000 and 2015; AEBC (Alliance for Equality of Blind Canadians) conference, Halifax in 2014 to Canadian Conference for Educators, Parents and Professionals of Children and Youth who are Blind or Partially Sighted.

Statement of Qualifications

Jeremy Milks Processing and Secure Transcription Manager

Summary

As the Manager of Processing and Secure Transcription, Jeremy is responsible for ensure customer projects for secure transcription are processed on schedule and with the highest quality. He ensures all deliverables meet BANA standards and pre-UEB (EBAE) or UEB Code using a proven internal proofing procedure

Jeremy joined T-Base Communications in 2007.

Credentials

- Literary Braille Transcription Certificate, CNIB, 2012
- UEB Update Certification CNIB, 2014
- Concordia University, 2001, Journalism
- Ontario College of Art and Design, 1998
- Carleton University, 1997, English

Areas of Expertise

- Braille transcription
- Transcription quality assurance
- Project scheduling

Experience

T-Base Communications, 2014 – present	Processing and Secure Transcription Manager
T-Base Communications, 2007 – 2014	Transcription Specialist
Ottawa Xpress, 2002 – 2007	Writer

Statement of Qualifications

Liza Ontong Transcription Specialist

Summary

Liza, a transcription specialist with T-Base since 2011, ensures educational materials are properly transcribed into braille according to BANA standards and pre-UEB (EBAE) or UEB Code. Liza is particularly familiar with programs such as PDF-to-text, MS Word, Duxbury, and Omnipage/scanning. She also adheres to the T-Base Quality Assurance procedures.

Liza joined T-Base in 2004.

Credentials

- Literary Braille Transcription Certificate, CNIB, 2012
- Unified English Braille (UEB) Update Certification, CNIB, 2014

Areas of Expertise

- Braille transcription
- Duxbury
- Quality assurance
- PDF to Text

Experience

T-Base Communications, 2011 to present Transcription Specialist

T-Base Communications, 2004 to 2010 Processing Assistant

Project Work

- Library of Congress: QA/Proofing
- IRS: QA/Proofing
- California Department of Education: QA/Proofing
- College Board : QA/Proofing
- Can East Shows Inc.: Transcription

Statement of Qualifications

Sailaja Hathaway Transcription Specialist

Summary

Sailaja transcribes source material into braille. She is responsible for the quality assurance and proof reading of braille received from other transcribers. She makes corrections in braille and Corel Draw according to braille formatting rules and regulations.

Sailaja joined T-Base Communications in 2017.

Credentials

- Braille Certifications in Literary, Textbook Formatting, and Nemeth Math from Library of Congress and National Braille Association
- Music Appreciation and Speech from Central Texas College, Gatesville, TX
- Apprenticeship Class (2000 hours) and On-The-Job Training for Literary
- Apprenticeship Class (2000 hours) and On-The-Job Training for Textbook Formatting
- Business Case Study and Planning from Harvard University Extension, Cambridge, MA
- Master of Commerce, Nagarjuna University, Andhra Pradesh, India
- Bachelor of Commerce, Andhra University, Andhra Pradesh, India

Areas of Expertise

- Braille transcription
- Quality assurance & proof reading
- Literary, Computer, Mathematics, Chemistry and Spanish using EBAE Literary, Nemeth Math, UEB Literary, UEB Nemeth and UEB Technical

Experience

T-Base Communications, 2017 to present Transcription Specialist

Self-employed, 2008-2017 Braille Transcriber

Mountain View Braille Facility, 2003-2008 Braille Transcriber

Project Work

- California Department of Education – Transcription Specialist and Internal Auditor
- Texas Education Agency – Transcription Specialist and Internal Auditor

Statement of Qualifications

Sailaja Hathaway Transcription Specialist

- Department of Treasury (IRS) – Transcription Specialist and Internal Auditor
- New York State Education Department (NYSED) – Transcription Specialist and Internal Auditor

Statement of Qualifications

Anthony Rybka Manager of Production Services, U.S.

Summary

As Manager of Production Services, Anthony ensures T-Base print deliverables are processed accurately and in a timely manner. Anthony brings many years of both warehousing and supervisory skills to T-Base production processes. Anthony communicates the status of projects with members of all departments involved. He stays updated on applicable best practices in the industry and consistently applies those while producing alternate formats for T-Base customers. All production work is completed under Anthony's supervision.

Credentials

- UEB Braille Certification, Library of Congress (in progress)

Areas of Expertise

- Braille production
- Project coordination

Experience

T-Base Communications, 2010 – present

- Manager, Production
- Production Team Leader
- Secure Transcription Specialist
- Transcription Specialist

Project Work

- Library of Congress, Project Coordination
- IRS, Project Coordination

Statement of Qualifications

Shona Wall *Manager, Quality Assurance*

Summary

As Manager of Quality Assurance at T-Base, Shona performs quality checks on all current and future client samples. She also holds approval for all manual large print and braille templates. Shona manages the development and quality assurance processes on all customer report bugs.

Credentials

- Certificate of Achievement, Adobe Acrobat Pro
- Accessible PDF with PDF/UA and WCAG 2.0
- SUNY Canton, Business Administration

Areas of Expertise

- Quality assurance techniques
- Braille transcription

Experience

T-Base Communications, 2016 – present	Manager, Quality Assurance
T-Base Communications, 2015 – 2016	Supervisor, Quality Assurance
T-Base Communications, 2013 – 2015	Supervisor, Transcription
T-Base Communications, 2008 - 2013	Transcription Specialist

Statement of Qualifications

Sommer Friot Manager, Processing and Production

Summary

Sommer has worked with T-Base for over 10 years and currently oversees and manages all aspects of production and processing at T-Base. Sommer is heavily involved in our quality assurance program; she ensures high-quality output material is delivered to customers in a timely fashion. Sommer has completed the ADA Coordinator Training Certification Program (ACTCP) through the University of Missouri College, Human and Environmental Sciences, School of Architectural Studies and the Great Plains ADA Center.

Sommer joined T-Base Communications in 2005.

Credentials

- Certified ADA Coordinator, 2017

Areas of Expertise

- Production processes
- Quality assurance

Experience

T-Base Communications, 2016 – present	Manager, Processing and Production
T-Base Communications, 2015 – 2016	Supervisor, Processing and Production
T-Base Communications, 2014 – 2015	Supervisor, Secure Transcription
T-Base Communications, 2009 – 2012	Office Manager
T-Base Communications, 2005 – 2009	Processing/Production Specialist

Project Work

- Fidelity Retail/National Financial: Sept, 2017 - Ongoing statement changes/improvements.
- Keybank/Tsys: Aug. 2017-Dec. 2017 - New client onboarding (complete)
- BMO Private Banking: Sept. 2017 – Dec. 2017 New line of work with existing client (complete)
- M&T/Tsys: Sept. 2017 – Present New client onboarding
- US Trust: Nov. 2017 – Jan. 2018 Redesign of current client statements (complete)

Statement of Qualifications

Sommer Friot Manager, Processing and Production

- Experian: December 2017 - New client onboarding

Statement of Qualifications

Barb Austin Quality Assurance and Transcription Specialist

Summary

In her time at T-Base, Barb has held various positions—in processing, QA and transcription. Barb is currently working on her BANA Braille Certification with the Library of Congress and is a certified ADA Coordinator with certification through the University of Missouri College, Human and Environmental Sciences, School of Architectural Studies and the Great Plains ADA Center. Barb monitors procedure standards, identifying issues in daily development work and transcribing secure documents.

Credentials

- Americans with Disabilities Act Coordinator Certification, ADA, 2016

Areas of Expertise

- Quality assurance
- Braille transcription

Experience

T-Base Communications, 2016 - present	Quality Assurance and Transcription Specialist (and ADA Coordinator)
T-Base Communications, 2013 – 2016	Manager, Secure Transcription
T-Base Communications, 2008 – 2013	Secure Transcription Specialist

Appendix Four: Certificates

T-Base Communications provides copies of certifications and letters of proficiency for review by JMU.



May 11, 2011

Aquinas Pather
Quality Assurance, Tactile Design Specialist
T-Base Communications Inc.
19 Main Street
Ottawa, ON K1S 1A9

Marc Maurer, President

200 East Wells Street
at Jernigan Place
Baltimore, MD 21230
Phone 410 659 9314 Fax 410 685 5653
www.nfb.org

Dear Mr. Pather:

Under a contract with the National Library Service for the Blind and Physically Handicapped, Library of Congress, the National Federation of the Blind operates the courses leading to certification as a braille transcriber or proofreader by the Library of Congress, National Library Service for the Blind and Physically Handicapped (NLS).

This letter is to attest that NLS recognizes the certification provided by CNIB for braille transcribers and proofreaders in literary (English Braille American Edition), mathematics (Nemeth Code for Mathematics and Science Notation), and music (Music Braille Code 1997) and honors it as equivalent to certification in these subjects from NLS.

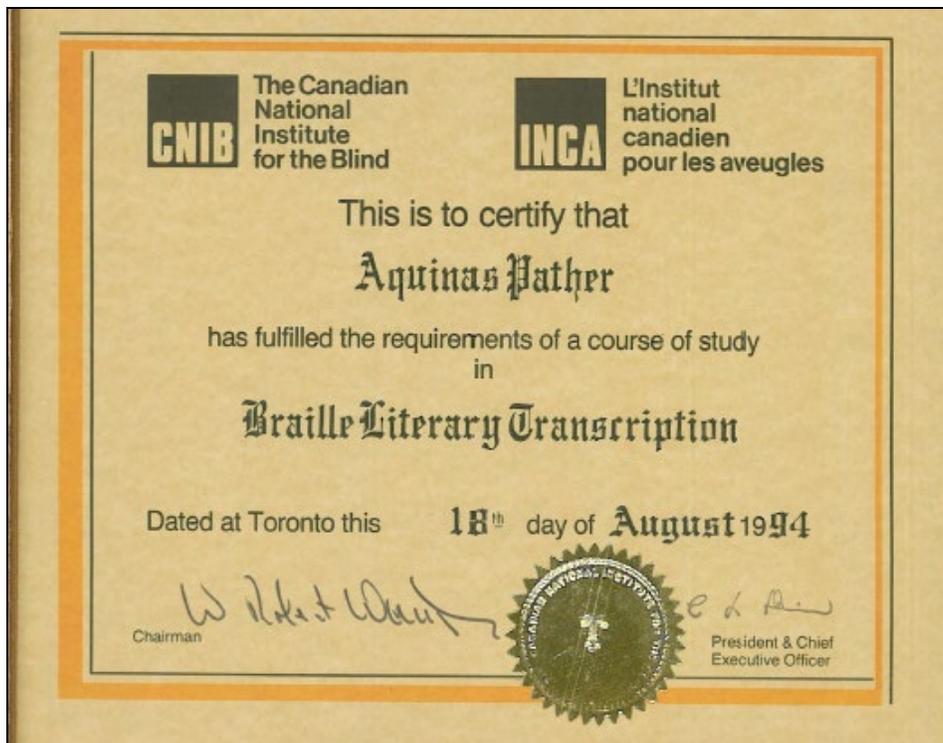
Sincerely,



Jennifer Dunnam
Manager of Braille Programs
NFB Jernigan Institute

cc: Judith Dixon, NLS

/jd





T·BASE

COMMUNICATIONS

OTTAWA, ON | OGDENSBURG, NY

	The Canadian National Institute for the Blind Library for the Blind		L'Institut national canadien pour les aveugles Bibliothèque pour personnes aveugles
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This is to certify that

Aquinas Pather

has fulfilled the requirements of a course of study in

Tactile Graphics Instruction

Dated at Toronto this 1st day of **October 2001**

 Chairman	 Executive Director
--------------	------------------------

 vision health. vision hope.	 santé visuelle, une vision pour l'avenir.
---------------------------------	--

This is to certify that

Jeremy Milks

has fulfilled the requirements of a course of study in

Literary Braille Transcription

Dated at Toronto this 8th day of **May 2012**

 Chair		 President and CEO
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CNIB

hereby acknowledges that

Jeremy Milks
has successfully completed the

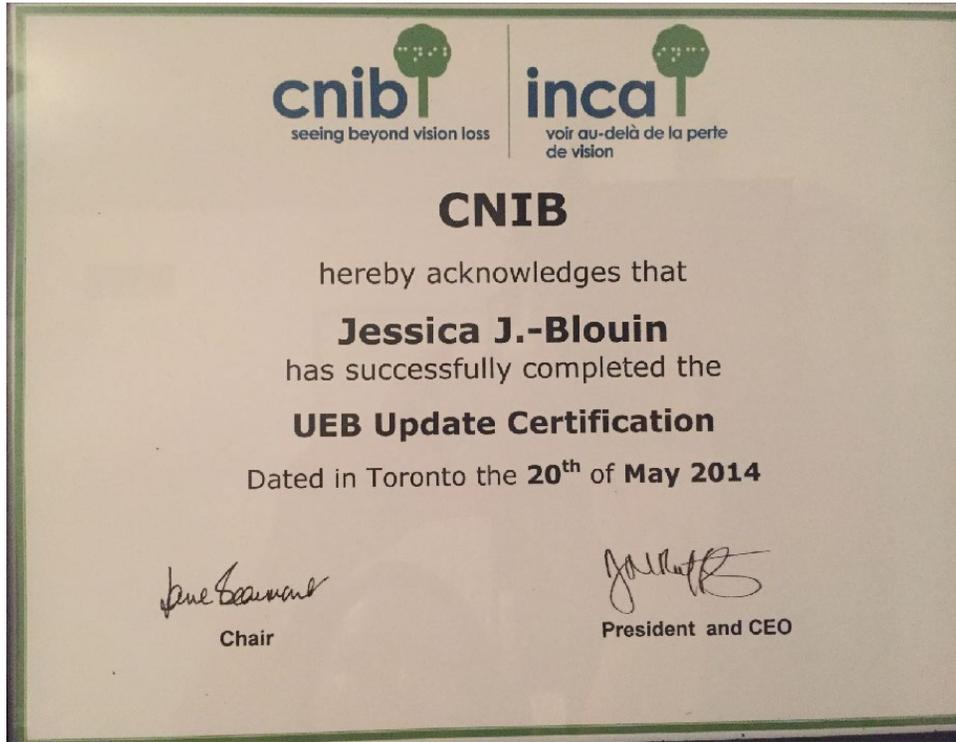
UEB Update Certification

Dated in Toronto the **2nd** of **June, 2014**

Chair

President and CEO









NFB
National Federation
of the Blind
Jernigan Institute

Marc Maurer, President

1800 Johnson Street Baltimore, MD 21230
Phone 410 658 8314 Fax 410 659 5129
www.nfb.org

March 29, 2013

Kim M. Engel
PO Box 1726
Airway Heights, WA 99001

Dear Ms. Engel:

After reviewing your transcription of the Mathematics Braille Transcribing certification test, it is my pleasure to inform you that a passing score was achieved. Congratulations on reaching this goal. Your certificate will be sent to you directly from the Library of Congress.

A report is attached. I would like to remind you that you may not discuss the contents of the exam, nor your transcription, with any other person.

I wish you success and satisfaction in your work of providing much-needed mathematics and science materials for braille readers.

Sincerely,



Lindy Walton
Mathematics Braille Advisor
National Federation of the Blind
Jernigan Institute

encl: 1-page report


FOUNDED IN 1945

NATIONAL BRAILLE ASSOCIATION
equal access to print through excellence in braille
95 Allens Creek Rd., Bldg. 1, Ste. 202, Rochester, New York 14618
585-427-8260 / FAX 585-427-0263
nbaoffice@nationalbraille.org www.nationalbraille.org

June 21, 2013

Executive Director
DAVID W. SHAFFER

JAN CARROLL
President
Louisville, Kentucky

WHITNEY WILLIAMS
President Elect
Garland, Texas

CINDI LAURENT
Vice President
Edina, Minnesota

DIANE SPENCE
Treasurer
Houston, Texas

HEIDI LEHMANN
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Immediate Past President
Minnetonka, Minnesota

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San Diego, California

JANA HERTZ
Aliso Viejo, California

BETTY MARSHALL
Shenwood Park, Alberta

LYNNETTE TAYLOR
Switzerland, Florida

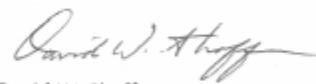
JOANNA E. VENNERI
San Francisco, California

Kim Engel
PO Box 1726
Airway Heights, WA 99001

Dear Kim:

Congratulations! You have successfully passed the Braille Textbook Transcriber's examination. You have received a grade of 94. Your certificate is enclosed to use as proof of certification.

Sincerely,


David W. Shaffer
Executive Director

Enc.



NATIONAL BRAILLE ASSOCIATION, INC.

...in support of those who serve print-handicapped readers

3 Townline Circle, Rochester, New York 14623-2513

585-427-8260 / FAX 585-427-0263

nbaooffice@nationalbraille.org



FOUNDED IN 1945

January 12, 2005

Executive Director
ANGELA P. COFFARO

Kim M. Engel
176 S. Chestnut, Apt. 5
Spokane, WA 99204

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Sun Lakes, Arizona

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Stilwell, Kansas

TAMI LENHOFF
Lincoln, Nebraska

BETSY McBRIDE
Copperas Cove, Texas

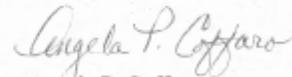
DOROTHY WORTHINGTON
Minnetonka, Minnesota

Dear Kim:

Congratulations! We are pleased to report that you have successfully passed the Braille Textbook Transcribers examination. Your certificate is enclosed.

You have received a grade of 88. A summation of the committee's evaluation is enclosed.

Yours very truly,



Angela P. Coffaro
Executive Director

Enc.



*National Library Service
for the Blind and
Physically Handicapped*

The Library of Congress

1291 Taylor Street NW, Washington, DC 20542; telephone (202) 707-5100; fax (202) 707-0712; Internet nls@loc.gov

July 9, 2003

Ms. Kim M. Engel
176 S. Chestnut
Apartment 4
Spokane, Washington 99204

Dear Ms. Engel

Congratulations, you have successfully fulfilled all requirements as a braille transcriber by the Library of Congress. Your certificate signed by the Librarian of Congress is enclosed.

The delay in processing your certification has been hampered by contractor delays, our own staffing shortages, and the new mail procedures instituted at the Library of Congress since September 11th 2001. We appreciate your patience and understanding during this difficult period.

Sincerely



Mary Lou Stark
Head, Braille Development Section

Enclosure
SG:sg





LIBRARY OF CONGRESS

National Library Service for the
Blind and Physically Handicapped**Statement of Proficiency in Unified English Braille****Kim Engel**

has demonstrated proficiency in the use of Unified English Braille (UEB) by achieving a passing score on the UEB Proficiency Examination administered by the National Library Service for the Blind and Physically Handicapped, Library of Congress.

This statement of proficiency serves to update the existing certification. Braille transcribers and proofreaders who receive it after achieving a passing score on the examination already hold the literary certification and/or a literary proofreading certification from the Library of Congress. This letter represents the only validation of UEB proficiency issued through the Library of Congress and should be accompanied by an original certificate dated before January 3, 2016. Transcribers and/or proofreaders who achieve their certification on or after January 1, 2016, do not require this documentation as their initial certification will reflect proficiency in UEB.



Karen Keninger, Director

July 14, 2015



LIBRARY OF CONGRESS

National Library Service for the
Blind and Physically Handicapped

Statement of Proficiency in Unified English Braille

LaVerne Blaasse

has demonstrated proficiency in the use of Unified English Braille (UEB) by achieving a passing score on the UEB Proficiency Examination administered by the National Library Service for the Blind and Physically Handicapped, Library of Congress.

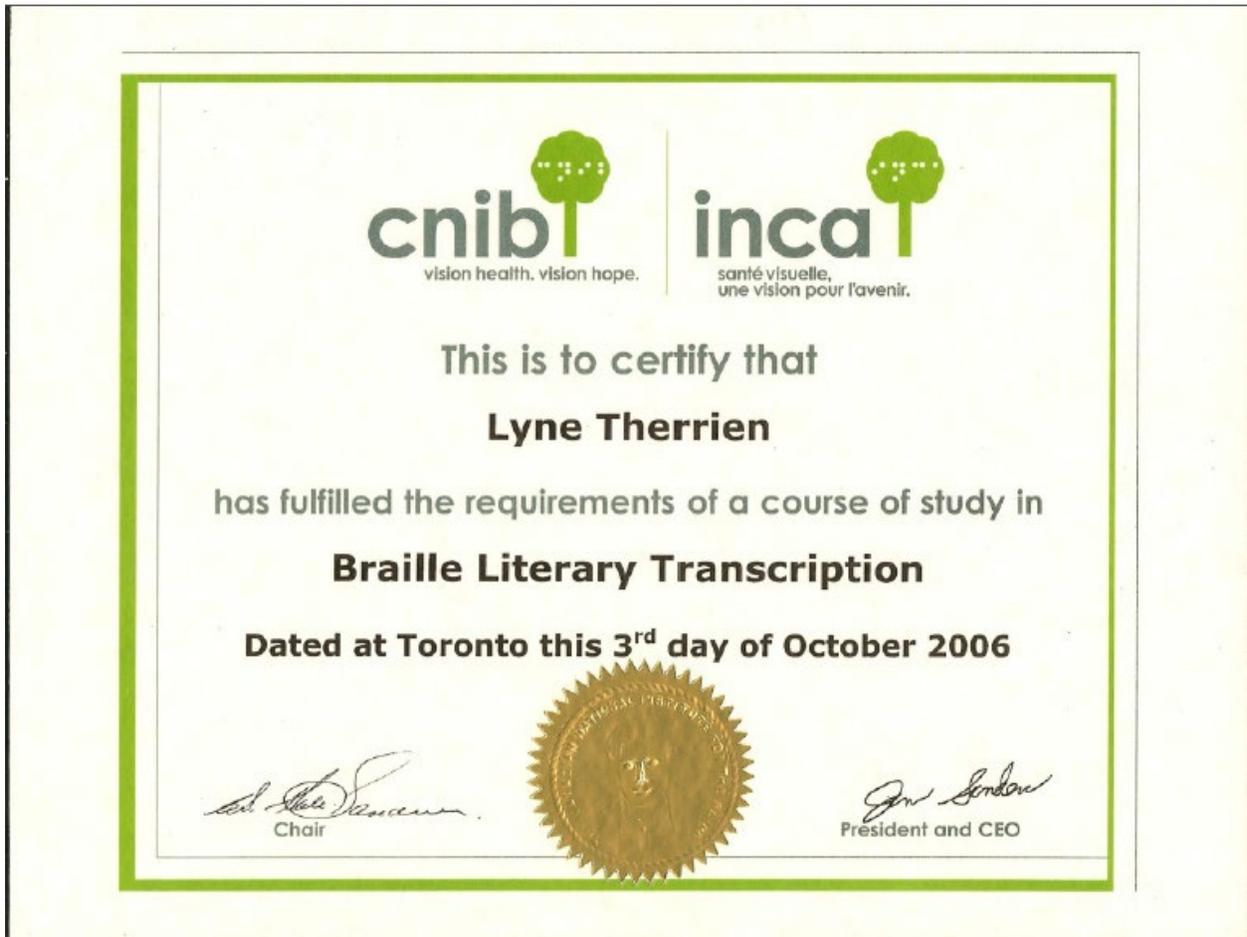
This statement of proficiency serves to update the existing certification. Braille transcribers and proofreaders who receive it after achieving a passing score on the examination already hold the literary certification and/or a literary proofreading certification from the Library of Congress. This letter represents the only validation of UEB proficiency issued through the Library of Congress and should be accompanied by an original certificate dated before January 3, 2016. Transcribers and/or proofreaders who achieve their certification on or after January 1, 2016, do not require this documentation as their initial certification will reflect proficiency in UEB.



Karen Keninger, Director

July 18, 2016





This is to certify that

Sailaja Hathaway

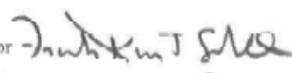
having satisfactorily fulfilled all requirements,
has been accepted as a

Braille Transcriber

by The Library of Congress

March 25, 2004

***National Library Service
for the Blind and
Physically Handicapped***

Director 

The Librarian of Congress





This is to certify that

Sailaja Hathaway

having satisfactorily fulfilled all requirements,
has been accepted as a

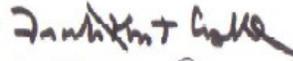
***Transcriber of Mathematics
Braille***

by The Library of Congress

June 24, 2008

***National Library Service
for the Blind and
Physically Handicapped***

Director



The Librarian of Congress



University of Missouri



This certificate verifies that

Barb Austin

has met the requirements for completion of the

ADA Coordinator Training Certification Program

effective Monday, August 29, 2016

This Certificate is valid for three (3) years from the effective date.



Certificate ID: 28945724-4617 Issued by: Great Plains ADA Center



Appendix Three: Proposed Cost

Transcription Fees	<u>Level 1</u>	<u>Level 2</u>	<u>Level 3</u>
EBAE Braille Literary	\$5.00	\$6.25	\$7.50
Nemeth Braille	\$7.50	\$7.50	\$7.50
UEB Technical	\$7.50	\$7.50	\$7.50
UEB Literary	\$6.25	\$7.00	\$7.50
UEB with Nemeth	\$7.50	\$7.50	\$7.50
Foreign Language Braille (EBAE or UEB)	\$7.50	\$8.50	\$9.50
Tactile Graphics (Swell Touch) Creation	\$12.50	\$12.50	\$12.50

- Above pricing assumes receipt of extractable electronic files, add \$3.00 per output page if not

Level 1 - The document is written in plain language, has no visual elements, such as charts, tables or illustrations and uses simple numbering systems, if any.

Level 2 - The document requires modification involving: re-creation of essential visual images as text, incorporation of footnotes and sidebars into narrative text and re-configuration of nested numbering systems.

Level 3 - The document requires further modification involving: incorporation of page cross-references in the text, incorporation of basic charts, graphs and tables as narrative.

Production Fees

Braille Paper	\$0.30	per page
Thermofom (Swell Touch) Pages - Copies	\$4.00	per page
Large Print Paper	\$0.25	per page
Cover Page	\$0.40	per page
Cerlox for braille; After 15 sheets	\$4.00	per volume
Spiral for Large Print; After 20 sheets	\$4.50	per volume
CD including labels	\$6.00	per CD

Notes:

- All page pricing is based on output page
- Shipping is charged as a pass-through cost
- All pricing is in USD

Required Attachments:

#1: Offeror Data Sheet (Attachment A in #FDC-1017)

#2: Small Business Subcontracting Plan (Attachment B #FDC-1017)

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 20 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 #
New York State Education Department	January 1, 2017 – Ongoing	New York State Education Department, 89 Washington Avenue, Albany, New York 12234	Lisa DeSantis, Manager (585) 343-5384 ext. 207
California Department of Education	2010 – Ongoing	1430 N Street, Sacramento, California 95814-5901	Gloria Dobson, Curriculum Frameworks & Instructional Resources Division – Associate Governmental Programs Analyst (916) 319-0628
Texas Education Agency	2015 – Ongoing	Purchasing, Contracts and Agency Services Division, Texas Education Agency, 1701 N. Congress Ave., Rm. 2-125, Austin, TX, 78701-1494	Debbie Gonzales, Accessible Instructional Materials Coordinator, Instructional Materials Division 512-463-9601
Duke University	Dec. 2016 – Ongoing/present	100 Fuqua Drive, Box 90120, Durham, North Carolina 27708	Rebecca McMillan, Assistive Technology and Case Management Coordinator (919) 668-1267
University of North Texas	Annually, September 2016 to August 2017	1155 Union Circle Denton, Texas, 76203	Rebecca Cagle, Assistive Technology Coordinator Student Services Coordinator (940) 565-4323

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

T-Base Communications USA, Inc. 806 Commerce Park Dr., Ogdensburg, NY. 13669

T-Base Communications Inc. 885 Meadowlands Drive E., Ottawa, Ontario, K2C 3N2

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: _____

ATTACHMENT B

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

Offeror Name: T-Base Communications USA, Inc. **Preparer Name:** Bruce Moszcelt

Date: Aug. 8, 2018

Is your firm a **Small 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 **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 SBSD 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 #FDC-1017 – Braille Transcription Services

Date Form Completed: Aug 8, 2018

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

Offeror / Proposer

T-Base Communications USA, Inc.
 Firm

806 Commerce Park Dr., Ogdensburg, NY. 13669
 Address

Bruce Moszcelt, 800-563-0668 ext. 1267
 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, again with submission of each request for payment)

RETURN OF THIS PAGE IS REQUIRED



August 14, 2018

ADDENDUM NO. TWO

TO ALL OFFERORS:

REFERENCE: Request for Proposal No: **RFP# FDC-1017**
Dated: **July 19, 2018**
Commodity: **Braille Transcription Services**
RFP Closing On: ~~**August 15, 2018 at 2:00 p.m. (Eastern)**~~
August 23, 2018 at 2:00 p.m. (Eastern)

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

1. The closing date and time have been extended to August 23, 2018 at 2:00 p.m.

Signify receipt of this addendum by initialing "*Addendum #2*" on the signature page of your proposal.

Sincerely,

Doug Chester, VCO, CUPO
Buyer Senior



August 8, 2018

ADDENDUM NO. ONE

TO ALL OFFERORS:

REFERENCE: Request for Proposal No: **RFP# FDC-1017**
Dated: **July 19, 2018**
Commodity: **Braille Transcription Services**
RFP Closing On: **August 15, 2018 at 2:00 p.m. (Eastern)**

Please note the following responses to vendor questions:

Question: Will vendors receive electronic (text-extractable) source files for jobs resulting from a contract?

Response: Yes.

Question: Section VII, Paragraph U provides that, with regards to the eVA Procurement System, a 1% transaction fee is payable and this fee is “determined by the date the original purchase order is issued.” Will there be a purchase order per assignment accepted by a bidder, or one purchase order issued on date of contract award? If the latter, and given that multiple bid winners may be chosen, what happens if no work is actually assigned to a bidder; i.e. is the fee still payable?

Response: Purchases will be made per assignment, via a purchase order. EVA fees will only be assessed on purchase orders received.

Question: Are vendors required to bid on all braille types listed?

Response: Vendors are not required to be able to produce every type of braille. The question is asking what types of braille code vendors have worked with and what the depth of experience is. The intent of the question is to determine what range of services are available. Vendors are not necessarily expected to be able to produce every type.

Question: What is the anticipated volume for each braille type listed?

Response: It will vary based on the number of students at JMU (and any other Virginia school that uses the contract) who utilize braille and the types of classes they are taking.

Question: Pre-UEB (i.e. EBAE) are listed as a requirement. Will there be UEB materials required as well? If UEB is required as well, will the math and chemistry materials be required in Nemeth within UEB context or UEB Technical?

Response: These are not requirements. JMU is trying to assess vendors' capabilities. Vendors should specify what types of braille they are able to produce but are not required to drill into this level of detail.



Question: Regarding the foreign languages requirement, if a vendor can transcribe only Romanized characters for foreign languages, is that acceptable?

Response: Vendors should list this in the response to the RFP. It's not a matter of acceptable or not, JMU wants to access capabilities.

Question: Regarding V. Proposal Preparation and Submission on page 3 of RFP #FDC-1017:

B. states that one (1) electronic copy in WORD format or searchable PDF of our entire proposal is required. If we submit the electronic copy as a Word document, is it acceptable to note, "Please see original" or "Please see original for ink signature" in places where signatures are required?

Response: As long as the original version of the proposal has ink signatures that is acceptable.

Question: Can companies from Outside USA can apply for this?

Response: JMU will evaluate all proposals received.

Question: Will companies need to be physically available for meetings?

Response: No

Question: Can vendors perform the tasks (related to RFP) outside USA?

Response: Vendors will need to describe in their response how they will deliver the product.

Question: Can vendors submit proposals responses via email?

Response: No. JMU cannot receive electronic proposal submissions.

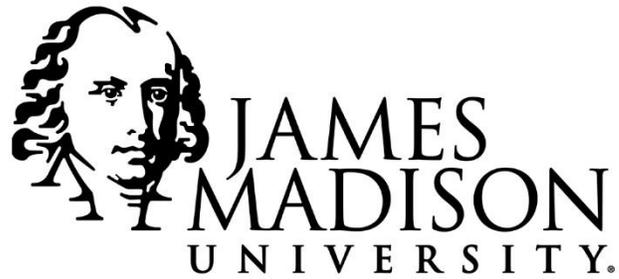
Question: Is JMU looking for a contractor that is a full service provider? Meaning some one that will send hard copies of all materials or just electronic files?

Response: JMU is looking for vendors who can just supply electronic files.

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

Sincerely,

Doug Chester, VCO, CUPO
Buyer Senior

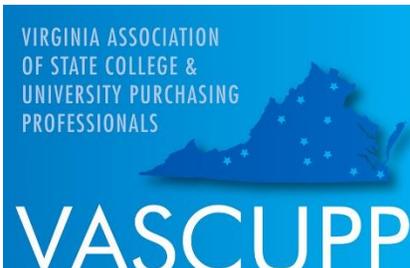


Request for Proposal

RFP# FDC-1017

Braille Transcription Services

July 19, 2018



REQUEST FOR PROPOSAL
RFP# FDC-1017

Issue Date: July 19, 2018
Title: Braille Transcription 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 August 15, 2018 for Furnishing The Services Described Herein.

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

All Inquiries For Information And Clarification Should Be Directed To: Doug Chester, Buyer Senior, Procurement Services, chestefd@jmu.edu; 540-568-4272; (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 in Ink)

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 # FDC-1017

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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 braille and tactile graphic production service 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 four (4) additional one-year periods.

II. BACKGROUND

James Madison University (JMU) is a comprehensive public institution in Harrisonburg, Virginia with an enrollment of approximately 20,000 students and 3,000 faculty and staff. There are over 600 individual departments on campus that support seven academic divisions. The University offers over 120 majors, minors, and concentrations. Further information about the University may be found at the following website: <http://www.jmu.edu>.

JMU's Office of Disability Services (ODS) collaborates with the JMU community providing programs and services that support the university in creating inclusive, equitable environments that value disability, diversity and accessibility. ODS currently provides accommodations and support to approximately 1,100 registered students, as well as assistance to numerous additional groups, including applicants for accommodation, faculty, parents, clinicians, etc.

The Accessible Media program (AcMe) in JMU's Office of Disability Services (ODS) provides accessible course content for students with visual impairments, including braille, tactile graphics, 3D models, screen reader accessible materials, etc.

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

As the number of students requiring braille and tactile materials increases, ODS has recognized a need for outside contractors to support the braille program with both standard and specialized braille codes. For example, AcMe provides braille and tactile graphics to students with visual impairments enrolled in a variety of classes, including STEM subjects, phonetics, anatomy, foreign languages, and more.

A. Production

1. For each braille type listed below, describe your company's experience with it and ability to produce it.
 - Pre-UEB braille
 - Nemeth
 - Chemistry
 - Spatial-Mathematics
 - Foreign languages

- Phonetics/IPA
 - Tactile Graphics
2. Describe the types of tactile graphics your firm has or can produce.
 3. Describe the methods of printing that your firm uses.
 4. Describe the different material(s) you use to produce tactile graphics. For example, SwellPaper, braille paper, etc.
 5. Describe any additional accessibility services your company offers. For example, remediating PDFs for accessibility, providing accessible textbook files, eText, HTML, and MathML, or other services.
 6. Describe your company's ability to deliver materials electronically. List the format(s) used in electronic delivery.
 7. Describe the step-by-step process your company would undertake to produce a complete textbook, especially one in a STEM field.

B. Timelines

Understanding that each braille job is different and requires an individualized quote and timeline, please provide the following information to the extent that it can be estimated:

1. Describe your typical turnaround time for a standard braille production request.
2. Describe the timeframes necessary for a braille production that has a short or quick turnaround time. For example, a rush tactile graphic would need to be submitted how many days in advance?

C. Quality Control

1. Describe your company's quality control processes and procedures.
2. Describe your qualification/certifications of the staff performing the quality control/proofing of production materials.
3. If you have certified transcribers on staff, describe their role with regards to production and quality control.
4. Describe any process by which edits can be requested. For example, if there is a critical typo or mistranslation of a specialized code, how can the university request a change?

D. Experience and References

1. Describe your company's experience in working with education institutions. If you've worked with colleges or universities, be sure to provide details about that experience.
2. Provide references for work that you have done for other institutions.

3. Describe any additional information that would provide further insight into your company's ability to provide braille production service to James Madison University

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.

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. **One (1) original and four (4) copies** of the entire proposal, INCLUDING ALL ATTACHMENTS. Any proprietary information should be clearly marked in accordance with 3.f. below.
 - b. **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 3.f. below.
 - c. Should the proposal contain **proprietary information**, provide **one (1) redacted hard 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.

2. 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.
3. 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 and will result in rejection and return of the proposal.
4. 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.
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.
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	30
2. Qualifications and experience of Offeror in providing the goods/services	20
3. Specific plans or methodology to be used to perform the services	15
4. Participation of Small, Women-Owned, & Minority (SWaM) Businesses	10
5. Cost	25
	<hr style="width: 100%; border: 0.5px solid black;"/> 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 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, 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.

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 \$50,000, 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) 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, 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, 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 procurement 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.
 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.

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 by Fax to 540/ 568-7936 or 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; 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 SBSBD-certified small businesses. This shall not exclude SBSBD-certified women-owned and minority-owned businesses when they have received SBSBD 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 SBSBD 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.**
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.** 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.**

- 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. 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; 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.
- R. 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.
- S. 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.
- T. 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.

IX. METHOD OF PAYMENT

The contractor will be paid on the basis of 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 are asking our vendors and suppliers to enroll in the Wells Fargo Bank single use Commercial Card Number process or electronic deposit (ACH) to your bank account so that future payments are made electronically. Contractors signed up for the Wells Fargo Bank single use Commercial Card Number process will receive the benefit of being paid in Net 15 days. 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.

Pricing

Provide a per page pricing comparison for the following:

- Braille
- Tactile graphics
- Rush production fee
- Standard production times
- Different types of braille code

Describe how the pricing varies based on content type.

If your company offers any additional related products or services not specifically requested in this RFP, provide a detailed description of the product/service and the related cost.

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 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.

- 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: _____

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 SBSBD 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, again with submission of each request for payment)

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)

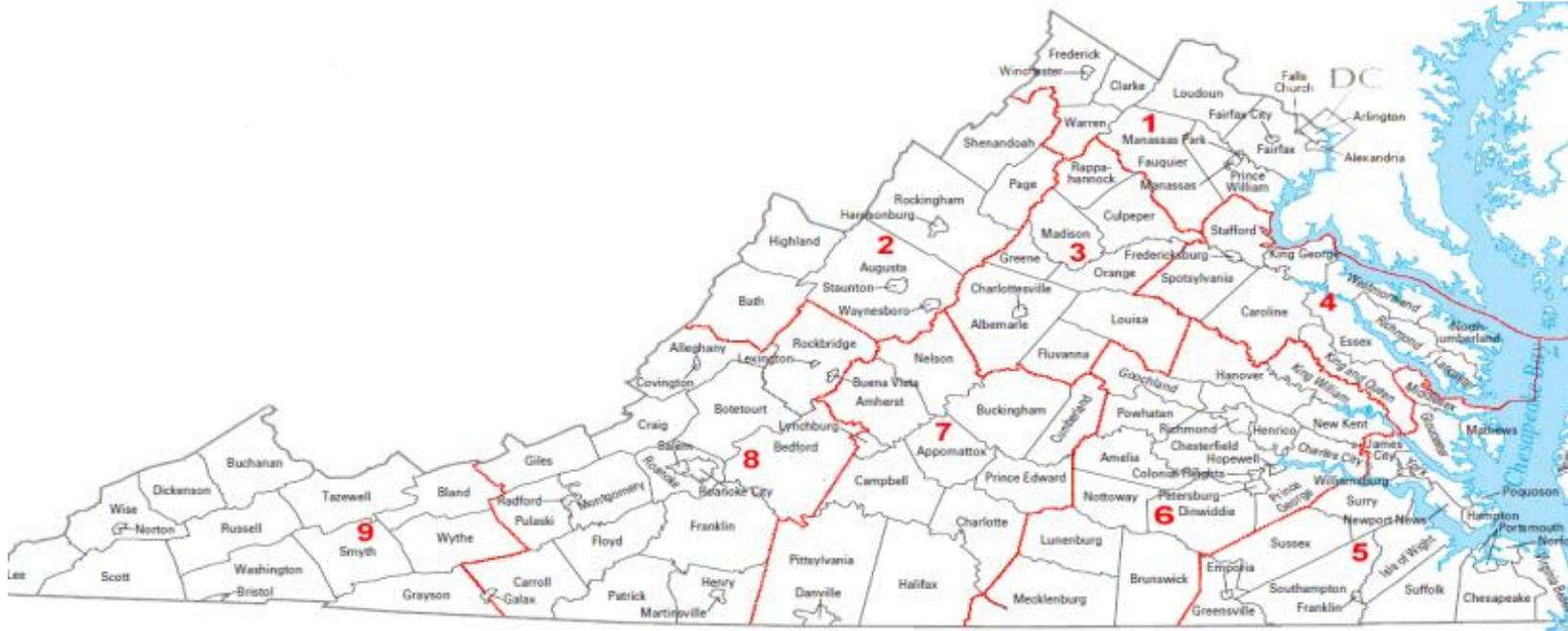
(Printed Name)

Title: _____

Title: _____

ATTACHMENT D

Zone Map



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

List of member institutions by zones

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