



COMMONWEALTH OF VIRGINIA
STANDARD CONTRACT

Contract No. UCPJMU5498

This contract entered into this 29th day of April 2019, by Forum One Communications Corporation hereinafter called the "Contractor" and Commonwealth of Virginia, James Madison University called the "Purchasing Agency".

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

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

PERIOD OF PERFORMANCE: From May 1, 2019 through April 30, 2020 with five (5) one-year renewal options.

The contract documents shall consist of:

- (1) This signed form;
(2) The following portions of the Request for Proposal LBS-1022 dated October 25, 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 No. One dated November 13, 2018;
(e) Addendum No. Two dated November 29, 2018.
(3) The Contractor's Proposal dated November 29, 2018 and the following negotiated modification to the Proposal, all of which documents are incorporated herein.
(a) Negotiations Summary, dated April 25, 2019.

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

CONTRACTOR:
By: [Signature]
(Chris Wolz)
(Printed Name)
Title: CEO

PURCHASING AGENCY:
By: [Signature]
(Lee Anne Beatty Smith)
(Printed Name)
Title: Buyer Senior, JMU



**RFP # LBS-1022, Web Application Development/Update Services
Negotiation Summary for Forum One Communications
Corporation**

April 25, 2019

1. Contractor agrees that this Negotiation Summary modifies the Contractor’s response to RFP# LBS-1022.
2. Contractor shall provide detailed project quotes (*number of hours to be worked, contracted hourly rates, deliverable(s) to be provided, timelines, total cost*) for the scope of work provided by the Purchasing Agency. The Purchasing Agency shall issue purchase orders in accordance with the project quote that shall authorize the Contractor to proceed with work. There shall be no work permitted under this contract without an agency issued purchase order. Any Purchasing Agency requested change(s) to the project scope of work that will institute a change in cost shall be addressed through an updated project quote and purchase change order; there shall be no increase to the project cost otherwise.

3. Hourly Pricing:

	Hourly Rate
Junior Analyst	\$87.30
Business Analyst	\$97.00
Task Manager	\$145.25
Project Director	\$179.45
Junior Strategist	\$113.40
Project Strategist	\$155.20
Senior Strategist	\$203.70
Associate Developer	\$114.40
Website Developer	\$160.05
Senior Website Developer	\$186.32
Technical Website Lead	\$203.70

4. **JMU’s Training/Technical Assistance Center (T/TAC) Branding and Accessibility Project**
<https://www.imdetermined.org/resources/documents/>

Task One: Define standards for 508/WCAG 2.0 compliance, categorize documents, and audit documents for reproduction.

- a. Review standards JMU has for 508/WCAG 2.0 compliance
- b. Audit
 - i. Categorize documents: determine which are used most often/determine the most important ones/prioritize documents
 - ii. Construct a plan for proceeding with low priority documents vs high priority documents.
 - iii. *Deliverable: Create and deliver recommendations document with details on how to move forward

Cost:

	Hourly Rate	# of Hours	Extended Cost
Task Manager	\$145.20	6	\$871.50
Senior Strategist	\$203.70	16	\$3,259.20
Total (if completed as part of a larger project; see Subsequent Tasks)			\$4,146.75



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April 25, 2019

*Senior Strategist	\$203.70	8	\$1,629.60
*Total if Standalone Project			\$5,760.30

*Standalone project will add the recommendations document project closeout deliverable; work done as part of the larger branding and accessibility project will not incur this cost due to gained project efficiencies.

Subsequent Tasks	Details/Deliverables	Cost Range **
Develop Document Brand Guidelines	Define the branding/style guide for the new documents, using the ImDetermined.org brand style guides as a basis. This includes defining guidelines for usage of the logo, imagery, clip art, icons, etc.	\$4,000
Create Templates	Create a set of templates in Microsoft PowerPoint, Microsoft Word, and Adobe InDesign that include the styles required to produce 508-compliant documents. These will be used to 1) update the current PDFs on the website and 2) serve as templates for JMU to create accessible documents in the future.	\$6,000 - \$10,000
Document Recreation and/or Reproduction	Recreate and/or reproduce all the documents to match the brand/design guidelines. Reproduce the documents in the various programs, such as PowerPoint, Word, or other programs in order to achieve 508/WCAG 2.0 compliance. Our team will take a phased approach reproducing the high-priority documents first.	\$20,000 - \$100,000
Quality Assurance/Testing	Conduct quality assurance testing prior to delivery to JMU using tools such as screen readers, screen magnifiers, etc. Provide thumbnail images of the documents from the website.	\$10,000 - \$30,000
508 Document Creation Training	Conduct a four-hour training with JMU staff on the creation of compliant PDF documents. Includes a high-level manual and recording of the training.	\$10,000
** Detailed quotes for Subsequent Tasks for the T/TAC Branding & Accessibility Project can be provided upon completion of Task One.		



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5. JMU’s Training/Technical Assistance Center (T/TAC) Problem Resolution Application Refresh Project

Discovery Phase for Problem Resolution Mobile Application: Contractor shall work with project stakeholders to explore opportunities, consider various approaches, work to confirm the project requirements, scope, and finalized statement of work/cost.

Goals Include:

- a. Understanding the audience and determining how to create an engaging experience to enable users to gain the most out of the application
- b. Technical audit of the existing codebase(s) to determine if the current approach and architecture is capable of accommodating the required functionality and user experience.

Tasks Include:

- a. Project Kickoff: Contractor internal meeting; kickoff call with client/project team.
- b. Collaborative Workshops: Includes one, half-day workshop.
- c. Digital Ecosystem Review: Review of existing assets including social networks; recommendations on communications strategy and using assets to achieve goals.
- d. Messaging Activities: messaging architecture development; tone, style, channel strategies.
- e. Audience Analysis: Includes up to five (5) interviews
- f. Technology Audit: Includes audit of existing codebase(s). THE technical leave develops a brief outlining the recommended technical approach, including possible opportunities to manage the web application, along with both native iOS and Android applications, from the same codebase as a progressive web application, or using frameworks such as React Native with e decoupled architecture.
- g. Creative Brief: The creative lead/designer develops a brief outlining the creative direction for the project.
- h. Project Management and Check-in Meetings: Includes weekly check-in meetings and weekly report delivery to client.

Cost:

	Hourly Rate	# of Hours	Extended Cost
Task Manager	\$145.25	20	\$2,905.00
Project Strategist	\$155.20	54	\$8,380.80
Senior Strategist	\$203.70	14	\$2,851.80
Senior Web Developer	\$186.32	32	\$5,962.24
Total			\$20,099.84

- 6. The Purchasing Agency shall preapprove in writing all Contractor reimbursable travel associated with this Contract. Contractors billing for travel related expenses must invoice in accordance with the U. S. General Services Administration (GSA) for lodging, meals and incidental expenses at the time of travel, which can be referenced at: <http://www.jmu.edu/finprocedures/4000/4215mie.shtml>.
- 7. Contractor’s initial response to Section IV. Question R. of RFP # LBS-1022 shall be supplemented by the following:

Forum One adheres to a thorough Quality Assurance (QA) process to confirm provided



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deliverables conform to the requested project scope, and determine if issues are ‘bugs’ resulting from our work, including:

- Acceptance Criteria for All Tasks and Deliverables. All work performed by Forum One will include acceptance criteria, agreed upon by both Forum One and JMU. Our team develops work products specifically to meet acceptance criteria.
- Internal Acceptance Criteria Testing. Work completed by developers or project teams is then reviewed by a Quality Assurance Analyst to confirm the work meets the agreed upon criteria. After the development of each new piece of functionality or ‘story,’ functional testing will be executed at the story level. As Forum One develops functionality for each story, we will internally test and provide JMU access to accept or reject each story as it is completed. What we test will be dictated by the acceptance criteria outlined in each user story. The process we will follow:
 - Our team will work with JMU to write acceptance criteria for user stories
 - JMU will review acceptance criteria as stories are created
 - Implementation of user stories will take place throughout each sprint
 - Forum One developers will mark a story as finished once implementation is complete
 - Forum One testers will test the story based on acceptance criteria or other Quality Assurance test plan criteria such as cross-browser compatibility
 - The user story will be marked as delivered or rejected
 - If rejected, it will be reassigned back to a developer
 - Once delivered, JMU will test and either mark as completed or rejected; rejected items will be reassigned to Forum One
- Version Control and History. All work completed and tested is logged within the ticketing system, with code versioning managed using Git.
- Client Acceptance. Work that has been completed and internally QA tested by Forum One will be made available for review by JMU on staging site servers. Upon confirmation of JMU acceptance, Forum One will push code to the live production site using preapproved development operations procedures.

8. Purchasing Agency shall own the rights to all code, documentation, and deliverables provided by Forum One under this contract with the format and repository for delivery begin mutually agreed to.
9. Contractor Invoicing:
 - a. Shall occur upon completion of work (*project progress invoicing is acceptable*).
 - b. Shall occur at the contracted hourly rate in quarter hour increments for the actual time that work was performed.
10. Contractor acknowledges receipt of RFP-LBS-997 Addendum #2.
11. There shall be no miscellaneous fees invoiced to the Purchasing Agency that have not been identified herein.

REQUEST FOR PROPOSAL
RFP# LBS-1022

Issue Date: 10/25/18
Title: Web Application Work
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 November 29, 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: LeeAnne Beatty Smith, Buyer Senior, Procurement Services, smith2LB@jmu.edu; 540-568-7523; (Fax) 540-568-7935 not later than five business days before the proposal closing date.

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

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

Name and Address of Firm:

Forum One Communications Corporation (Forum One)

2200 Mount Vernon Avenue

Alexandria, VA 22301

By:



(Signature in Ink)

Name: Chris Wolz

(Please Print)

Date: November 29, 2018

Title: President and CEO

Phone

Web Address: https://forumone.com

: 703-548-1855

Email

: cwolz@forumone.com

Fax #: 703-995-4937

ACKNOWLEDGE RECEIPT OF ADDENDUM: #1 AS #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.



FORUM ONE™

Extend Your Influence

James Madison University

Web Application Development/Update Services
TECHNICAL PROPOSAL

Solicitation No.: LBS-1022

Offeror: Forum One Communications Corporation (Forum One)
2200 Mount Vernon Ave.
Alexandria, VA 22301
John Johnson, Account Director
jjohnson@forumone.com
(703) 894-4315

Contract Office: Commonwealth of Virginia
James Madison University
Procurement Services MSC 5720
752 Ott Street, Wine Price Building
First Floor, Suite 1023
Harrisonburg, VA 2280
LeeAnne Beatty Smith, Buyer Senior, Procurement Services
smith2LB@jmu.edu
(540) 568-7523

Submission Deadline: November 29, 2018; 2:00 PM EST

Table of Contents

1. Response to Section IV, Statement of Needs	4
A. Executive Summary	4
B. Resume and Contact Information	5
John Johnson, Account Director	5
C. Subcontracted Work	6
D. Requesting a Project Quote	7
E. Process for Determining the Times/Hours Needed	7
F. Project Timelines	8
G. Customer Service Model	8
H. Experience Developing Accessible Applications	9
I. Documentation	10
J. Support Provided During Implementation of New Applications	11
Phase 1: Discover	12
Phase 2: Design	12
Phase 3: Deliver	12
K. Past Performance Examples	13
1. Educational Services	13
2. Health and Human Services	14
3. Higher Education	15
4. Application Front- and Back-Ends	17
L. Experience Converting Existing Application to New Code Base	18
M. Experience with Custom Back-end Management Systems	18
N. Plan for Maintaining Open Communication	18
O. Additional Services	19
P. Ability to Provide Training Sessions	19
Q. Ability to Present Innovative Ideas	20
R. Process for Issue Resolution	20
S. Method for Service and Maintenance of Application	21
Review and Audit	21
Fully Managed Website Hosting and System Administration	21
System Administration Tasks	22
Solution Details	22
Included Tasks and Activities	22
Ongoing Support and Maintenance	22
WordPress Core and Plugin Updates and Patching	23

T. Application Security Features	23
U. Approach to Test and Production Environments	23
V. Hosted and Data Storage Services	24
2. About Forum One	25
3. Pricing Schedule	26
A. Labor Categories and Rates	26
B. Training Costs	27
C. Ongoing Support and Hosting Costs	27
D. Other Direct Costs	27
4. Attachments	27
Attachment C: Sample Forum One Resource Resumes	28
Keenan Holloway, Technical Architect	28
Kelsey Hicks, Design Lead	29
Sara Tetreault, Creative and Content Strategy Lead	31
Chaz Chumley, Front-end Development Lead	34
Alex Ford, Back-end Development Lead	36
Molly Mattessich, Project/Program Manager	37

1. Response to Section IV, Statement of Needs

A. Executive Summary

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

Forum One is pleased to present this proposal to the Institute for Innovation in Health and Human Services (IHHS) at James Madison University (JMU) to provide web application updates and/or development services on an as-needed basis to the University.

We are a team of more than 100 technical and creative professionals, including top developers in the open source community, award-winning designers, and experts in understanding user needs and crafting compelling digital experiences. We serve clients all over the world with offices in Alexandria, VA (HQ); Washington, DC; Seattle, WA; and Cologne, Germany. Additional information about the Forum One team, including LinkedIn profiles, can be found on our website at forumone.com/team. We have also included a sampling of resumes from our team in Attachment C.

Forum One understands the importance of this role, and can confirm we have the equipment, processes, personnel, and knowledge to provide web application services for current and future University projects. Our team has achieved real results on more than 2,000 digital strategy, creative, technology, data, and user experience activities for 750+ issue-focused organizations since our founding in 1996.

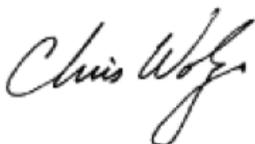
Forum One has a deep commitment to societal improvement and a longstanding record of projects with and for the educational community. We believe JMU will be hard-pressed to find another team of experienced and dedicated staff who exclusively work for government, nonprofits, and think tanks.

As detailed in this response, we tailor our processes around client needs and field of expertise. We staff our projects with people who care and know about your issues, and who can take your team's hand from the beginning to the end of the project. Our highest priority is to make it easy for users to find the information they seek while putting your most valuable content in plain view.

The following proposal provides detailed responses to all of your requested *Statement of Needs* items, and demonstrates our qualifications to serve as a long-term partner for IHHS.

Forum One welcomes the opportunity to work with your team, and we look forward to discussing this proposal with you.

Sincerely,



Chris Wolz, President and CEO
2200 Mount Vernon Ave., Alexandria, VA 22301
703.894.4311 | cwolz@forumone.com

B. Resume and Contact Information

B. Provide the resume and contact information of a primary point of contact for the University.

Forum One understands that successful application support efforts must address several areas of expertise: vision and coordination, user experience, design, and technology. Our primary point of contact for your team has over a decade of experience providing application support services to clients similar in scope, size, and nature to IHHS.

John Johnson, Account Director

Address: 2200 Mount Vernon Ave., Alexandria, VA 22301

Email: jjohnson@forumone.com

Phone: (703) 894-4315

EDUCATION

- **The George Washington University**, Master of Arts, Education and Human Development, Concentration in Technology Leadership, Washington, DC, 2005
- **The University of North Carolina at Chapel Hill**, Bachelor of Arts, School of Media and Journalism, Chapel Hill, NC, 1998

PROFESSIONAL EXPERIENCE

Forum One, Account Director and Project Manager, Washington, DC, June 2015 – Present

- Digital strategy consultant and project manager serving the government and nonprofit markets.
- Advises clients on six key areas, including analytics, technology, user experience, creative, strategy, and support.
- Serves as the primary point of contact for nonprofit, foundation, and government clients including the National Association of REALTORS, James Bell Associates, the MATHCOUNTS Foundation, and Trans-Management Systems Corporation (TMSC).
- Works collaboratively with teams to provide client-specific solutions, and execute as flawlessly as possible.
- Provides guidance on strategic communications, design, user experience, and user engagement.
- Develops detailed project schedules, status reports, and projections to keep clients informed.
- Ensures clear communication regarding scope and schedule between Forum One and clients.
- Additional responsibilities include selling new business and overseeing accounts.

Flashing12 Consulting Services, Co-Founder and Strategist, Washington, DC, Jan 2006 – May 2015

- Co-founded web services agency helping organizations reach unique online communications goals.
- Primary focus on project management and business development for net new accounts resulting in close partnership with businesses in the DMV area and abroad including think tanks, schools, charities, and issue advocates.

New Signature, Director of Strategic Accounts, Washington, DC, June 2012 - Feb 2015

- Negotiated and closed technology solutions for 100+ accounts, including Direxion Funds (financial); Inside Higher Education (education); National Archives and Records Administration (federal); American Association for the Advancement of Science (association).
- Supervised teams of 6+ engineers.

Practice Greenhealth, IT Director, Washington, DC, July 2009 – Nov 2011

- Assumed primary admin responsibility for application stack.
- Worked with executives to ensure effective system design, performance and availability, growing membership by 25% to 1,067 hospitals and hospital systems.

Cision Inc., Director of eLearning and eServices, Chicago, IL, Nov 2005 – Oct 2008

- Managed technical projects for Client Services and Production teams, including development and implementation of computer-based e-learning programs supporting 100,000+ customers in 150+ countries.

Center for American Progress, Webmaster, Washington, DC, Oct 2003 – Sept 2005

- Developed and co-produced initial website, blog and sub sites, including best practices for publishing content.
- Set foundation for web properties that established some of the top web resources in the United States and abroad.

SKILLS

- CMS: Drupal, WordPress
- Project Management: Basecamp, Jira, Teamwork
- Digital Marketing: MailChimp, AdWords, paid social (Twitter, LinkedIn, Facebook, Instagram)
- Code: HTML, Some CSS
- Other: Salesforce, Google Analytics, Microsoft Office suite, Apple iWork suite

C. Subcontracted Work

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

Our team is comprised of Forum One as the prime contractor, with possible subcontractors DrupalSquad and Matrix Multiplier Consulting. Forum One will lead strategy, user experience, design, and development activities, with maintenance support from DrupalSquad and quality assurance support from Matrix Multiplier. We have worked successfully with both DrupalSquad and Matrix Multiplier for years on similar projects.

Forum One may partner with DrupalSquad for approximately 20-25% of any maintenance work on this project to help ensure your web presence is stable, secure, up-to-date, and tuned for high performance. DrupalSquad focuses on white-glove maintenance and support, incorporating engineering best practices into your business, and maintaining exceptional status within the Drupal community. Forum One's established partnership with DrupalSquad helps prevent emergencies and proactively complete tasks. DrupalSquad is a proud member of the Drupal Association.

Forum One may engage Matrix Multiplier Consulting to provide supplemental quality assurance support. Founded in 2016, Matrix Multiplier provides quality assurance and project management services to help organizations grow and scale their quality programs. Comprised of a team of six

consultants, Matrix Multiplier provides a range of quality assurance testing services, including regression testing, integration testing, and mobile and browser testing. Matrix Multiplier also works with organizations – including Forum One, the Perinote mobile app, and more – to develop and implement comprehensive quality assurance programs, including staff training and augmentation to provide QA on large-scale projects.

D. Requesting a Project Quote

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

To begin a new project quote, JMU will send a request via email to the designated primary point of contact with a request for Project Quote. This requirements document should include:

- A high-level description of the work to be completed
- A list of functional or technical requirements
- URLs or links to any existing work
- Estimate of number of hours required, if available
- Required timeline

Based on the requirements documentation, our team will produce a Project Quote with an overview of our approach to accomplish the tasks, schedule, cost, and rates. This Project Quote will then be sent to JMU by the requested deadline. This Project Quote can then be incorporated into the purchase order. During the development of the quote, our team may request meetings (via web conference or in-person) to discuss the requirements and uncover insights that our team needs to provide accurate estimates.

E. Process for Determining the Times/Hours Needed

E. Describe your firm's process for determining the time/hours needed for a University project. Specify all information that will be provided on a project quote.

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

Based on the gathered requirements, our team will then assess the effort level for implementing the requested changes or building the new feature based on our expertise and experience on similar engagements. Finally, Forum One will deliver a succinct statement of work (SOW) outlining our understanding of the project, our solution and approach to meeting your requirements, our estimated level of effort in terms of hours and personnel, and any assumptions we made in the development of our estimate.

F. Project Timelines

F. Describe how project timelines will be determined and communicated to JMU client. Describe your firm's process for adhering to timelines.

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

Should Forum One be selected to move forward with the project, we will provide a more detailed timeline to JMU outlining the steps and tasks that are required to deliver the project, the dates on which we expect to complete those steps and tasks, and the points where JMU's input and review will be required. Forum One will work with JMU to determine the timeline format and delivery mechanism with which JMU feels most comfortable, however we generally use Teamwork and Jira/Confluence to communicate project timelines.

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

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

G. Customer Service Model

G. Describe your firm's customer service model.

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

JMU will be assigned a team of experts who are dedicated to the relationship and to your success. Forum One was founded with the focus of serving mission-driven organizations such as JMU. Our team is highly trained on all aspects of the work, including project management, front-end development, user experience design, visual design, technical planning, and implementation.

Forum One believes technology can supplement, but never replace, personal interaction with our customers. As such, we provide a secure portal so project team members can access their information online if desired. However, you can always call our team at any point.

In addition to regularly scheduled project check-ins and reporting, JMU will have the option of reaching us via email, phone, or the use of the portal for non-urgent issues. Forum One will respond to all requests within one business day. Small tasks are typically completed within 1-3 days depending

on complexity, the estimated time to complete the task, and client response to questions from the developer. Larger tasks will be scheduled for client review within 2-3 days of the request. For instance, if a request is made for a task that is estimated to take 8-10 hours to complete, Forum One will advise the client of the date that it will be ready for their review on the development site.

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

It has always been our view that customer service is the most important part of our work. We train extensively on customer service and we hire individuals with the ability to effectively interact with our clients and project teams. In addition, Forum One believes in proactive client satisfaction check-ins, and our CEO and VP of Client Services conduct these periodically to gauge overall satisfaction and identify areas for improvement in our service.

H. Experience Developing Accessible Applications

H. Describe your firm's experience in developing applications that are accessible for all levels and types of disabilities, including Section 508 compliance. Provide examples of previous and/or current work demonstrating knowledge around accessibility standards.

Forum One has launched hundreds of accessible websites for educational institutions; federal, state, and local government agencies, and other large organizations that comply with Section 508, the Web Content Accessibility Guidelines (WCAG) 2.1, and other accessibility requirements. We have developed Section 508 compliant, accessible applications and conducted staff trainings on creating accessible content for clients including Georgetown University (giwps.georgetown.edu), whose rigorous internal accessibility standards go beyond Section 508 and WCAG, Fairfax County Public Schools (fcps.edu), the Office of Head Start (eclkc.ohs.acf.hhs.gov), the National Assessment of Educational Progress (nationsreportcard.gov), the National Endowment for the Humanities (neh.gov), and many more.

Our team understands that user-centered, responsive, accessible design is critical to serving real-world audiences, and we have extensive experience designing digital solutions that are easy and intuitive to use across devices and for people using assistive technologies.

We have numerous strategists, designers, and developers on staff who are experts in accessible design and technology, and advocate and educate within the open source community for creating solutions that serve all users. Our experts frequently deliver talks (youtube.com/watch?v=RkanaB5BEJl) and develop engaging online trainings (section-508-refresh-2018.webflow.io/) to help developers and organizations comply with the latest accessibility guidelines and best practices for inclusive design. Our open source developers pioneered the Gesso starter theme (drupal.org/project/gesso), which builds in key accessibility optimizations that became part of Drupal 8's core foundation. We also have extensive experience auditing web ecosystems for accessibility, conducting manual and automated accessibility testing, remediating files and documents, and conducting accessibility training.



Accessibility means that **anyone**, regardless of whether they have the ability to manipulate a mouse, of how much vision or hearing they have, and regardless of whether they have use of all of their limbs **can use the exact same websites as a fully-abled person.**

Forum One's experts frequently educate and advocate in the open source community for accessible, inclusive design, for example developing interactive trainings like: [section-508-refresh-2018.webflow.io](https://www.webflow.io/section-508-refresh-2018)

Our web design and development approach builds in accessibility from the beginning, incorporating key steps and best practices into our user experience design, information architecture, visual design, development, and quality assurance testing phases to provide accessible:

- **UX and Navigation:** Our team creates clear, direct, and intuitive user journeys to priority site content, and structures site navigation to be straightforward and simple for screen readers and keyboard controls to navigate.
- **Design:** We incorporate best practices for accessible color contrast into all of our designs, and ensure color isn't the only way we communicate key information or indicate site organization. We also apply years of experience creating friendly mobile experiences to design responsive layouts for each key device size – desktop, tablet, and phone.
- **Content:** We recognize that digital content must serve multiple audiences, with widely varied needs and preferences. Our team applies plain language principles in crafting clear and compelling headings, taxonomies, keywords, and calls to action. We also apply accessibility best practices for multimedia content, including alt tags for images, video and audio captions, and ensuring PDFs and other files are accessible.
- **Coding:** Our open source Gesso theme builds in key optimizations for accessibility, and we follow coding best practices to ensure assistive technologies can successfully render and navigate our sites.

I. Documentation

I. Describe the documentation offered for University projects.

Forum One produces a variety of documentation for any given project. The types of documentation produced will depend on the type of project and the phases required to complete the work. We will also work with JMU to understand the types of documentation needed to properly detail the outputs of projects and ensure those requirements are met in our deliverables.

Example documentation generally produced for most typical projects include:

- **Strategy Brief:** A summary and outcomes of discovery phase work focused on defining the strategic need for a project including goals and objectives, audience analysis, and how we will define success of the project.
- **Technical Brief:** An overview of the technical solution we intend to utilize to meet the requirements of the project.
- **Product Requirements:** Product requirement sheets are developed prior to implementation to detail individual features and functionality, capture specific needs, and to highlight and answer outstanding questions.
- **Inline Code Documentation:** Forum One adheres to industry best practices in providing inline code documentation that is clear, consistent, and understandable.

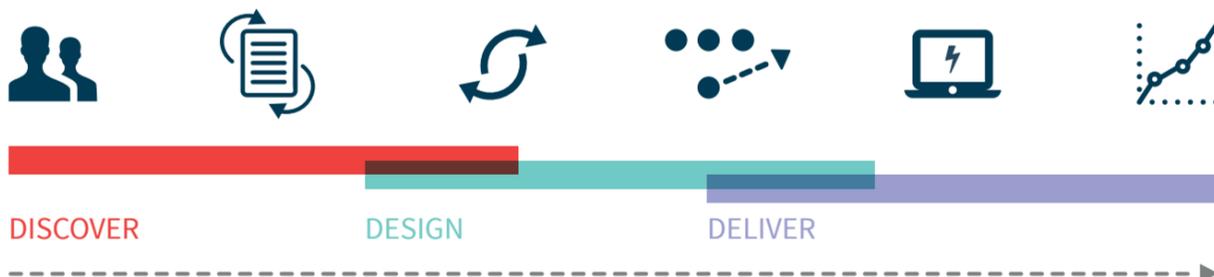
This is not an exhaustive list of the documentation products that Forum One produces – we tailor the documentation to the specific needs of the project. In every scenario, however, each of our projects is documented to ensure that the client or other organizations can easily follow what has been done, why it was done, and how to maintain it.

J. Support Provided During Implementation of New Applications

J. Describe the support provided during the implementation of new or updated applications.

Forum One’s approach to the development of any new application is based on the Agile/SCRUM project delivery methodology. During the first two phases, we work to define the work to be completed. Then, in the final phase, our team works together to develop or update the application via a series of two-weeks sprints. The length and timing of phase one (Discovery) and two (Design) will vary depending upon the requested work.

This section outlines the tasks and deliverables that may be included in the development or update of any web or mobile application. We have broken this work into three stages: Discover, Design, and Deliver.



Phase 1: Discover

The Discover Phase is high-energy and designed to set a clear direction for the task. This phase covers the work from project launch to setting the approach and direction for the project. Tasks and activities may include:

- Collaborative Workshops
- Audience Research and Analysis
- Messaging and Content Strategy
- Creative Strategy
- Technical Discovery
- *Deliverable: Task Kickoff Meeting*

Phase 2: Design

Once we have a shared understanding, we begin to transform our ideas into creative assets. We use a rapid creative approach whereby our team shows you page designs and/or other assets as we create them to get your feedback. This collaborative approach allows us to arrive at the design solution for the new site quickly. Tasks and activities may include:

- Visual Concept / Creative Direction
- Prototyping / Wireframing
- Visual Design
- Technical Architecture
- *Deliverable: Designs*
- *Deliverable: Product Requirements*

Phase 3: Deliver

With the creative direction in place, our emphasis shifts to building and refining the solution, never losing focus on the project vision and our measures of success. Tasks and activities may include:

- Website Development / Updates
- Mobile Application Development / Updates
- Asset Production
- Quality Assurance
- 508 Compliance
- Training
- Analytics Set-Up and Configuration
- Training and Documentation
- *Deliverable: Launch*

K. Past Performance Examples

Forum One has demonstrated excellence in designing and developing engaging web applications that connect educators, researchers, policymakers, and other key audiences in the educational services, health and human services, and higher and public education sectors with relevant, actionable tools and information.

The project examples we have chosen to showcase highlight the expertise we bring to deliver effective and audience-centered web application development services to JMU.

1. Educational Services

Forum One has worked with numerous universities, large public school systems, research organizations, and educational professional associations, giving our team practical insight into the needs of your audiences and content managers. We have developed e-learning applications, educational training courses, and digital resources for teachers and academic professionals for USAID EducationLinks (edu-links.org), the National Association for the Education of Young Children (naeyc.org), the Association of American Medical Colleges, and the National Endowment for the Humanities (NEH) and its EDSITEment! Program (edsitement.neh.gov).

Recent examples of successful educational services projects include:

- **Fairfax County Public Schools (FCPS):** FCPS is the tenth largest school system in the U.S., with more than 200 schools and centers – each with its own website – serving 186,000 students and 24,000 full-time staff. Forum One completely re-engineered and redesigned the fcps.edu ecosystem of websites in Drupal 8, creating a flexible platform that can serve as a central communications channel for multiple, diverse audiences. Our solution uses the latest open source technology to allow FCPS to maintain a strong central web presence while giving individual schools the flexibility to spin off websites that meet their unique needs while staying connected and on-brand.
- **Bureau of Consumer Financial Protection (BCFP) Teachers' Digital Platform:** The Forum One team developed and launched the BCFP Teachers' Digital Platform (consumerfinance.gov/practitioner-resources/youth-financial-education) to connect educators with a suite of digital tools and resources to help teach financial literacy to youth. These include the Curriculum Review Tool, an interactive journey to financial well-being that walks educators through the Bureau's research on effective financial education (consumerfinance.gov/practitioner-resources/youth-financial-education/journey), and a searchable interface to help teachers in any subject find financial literacy activities to incorporate into their existing curricula.
- **National Assessment of Educational Progress (NAEP) Nation's Report Card:** Since 2012, Educational Testing Service (ETS) has engaged Forum One to design and build more engaging, interactive reports at nationsreportcard.gov to share the NAEP results, which policymakers, educators, and the media rely on to help understand and improve the quality and effectiveness of public education at the national, state, and district levels. Forum One has completed multiple reports each year under the NAEP program, including the most recent 2017 Nation's Report Cards for Mathematics and Reading. We also created a new Highlights

page (nationsreportcard.gov/reading_math_2017_highlights) of infographics, visualizations, and data stories to summarize key takeaways, trends, and insights.



Forum One provided re-architected Fairfax County Public Schools' digital presence at fcps.edu, connecting staff, students, and stakeholders across 200+ schools and centers with customized application tools and resources.

2. Health and Human Services

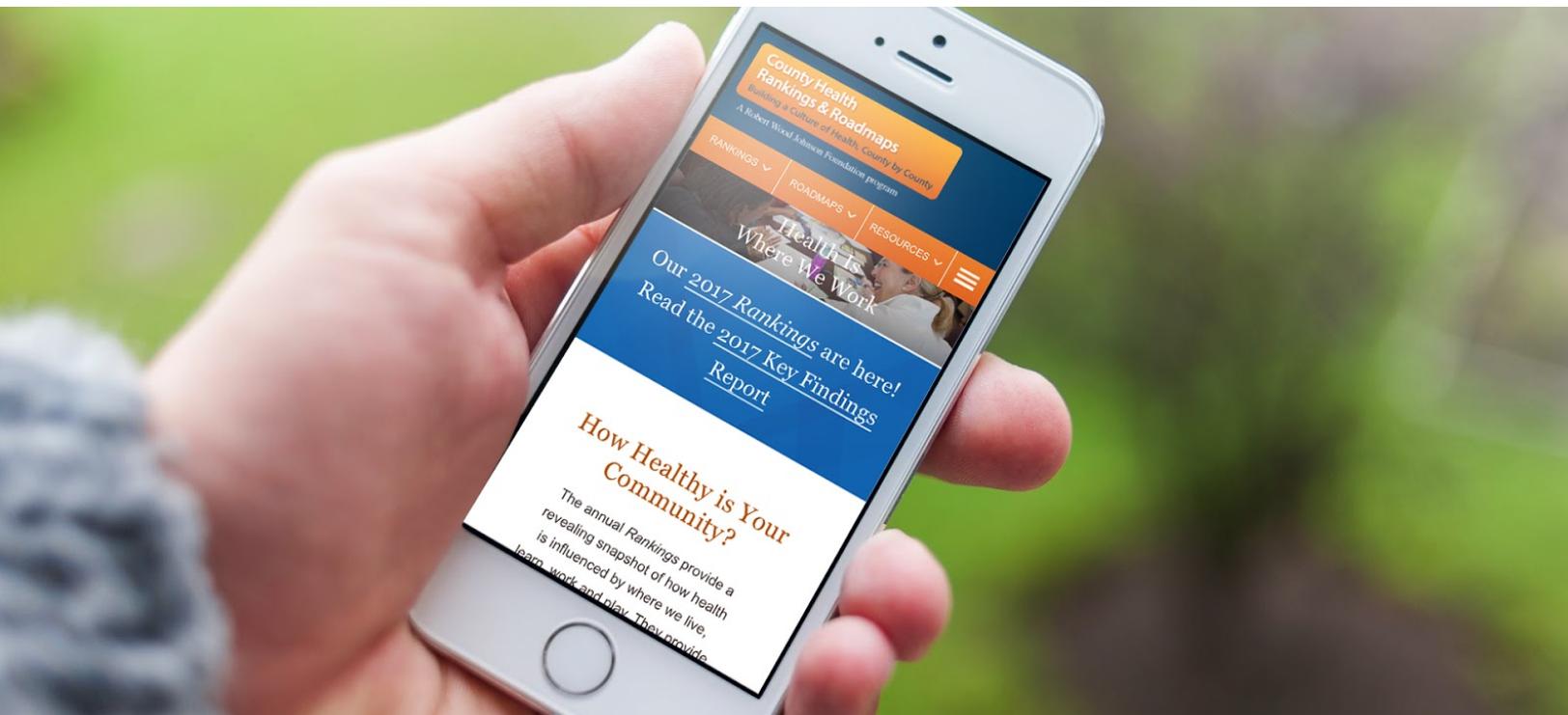
More than 60% of our work over the past five years has been in the health and human services sectors, creating digital resources to serve health professionals, stakeholders, researchers, educators, and the public. We have supported dozens of Bill & Melinda Gates Foundation and Robert Wood Johnson Foundation Initiatives, and delivered successful projects for clients including the Patient-Centered Outcomes Research Institute (pcori.org), the City Health Dashboard (cityhealthdashboard.com), the National Coalition of STD Directors (ncsddc.org), the Elizabeth Glaser Pediatric AIDS Foundation (pedaids.org), and the WIC program sites for the Colorado Department of Public Health and Environment (coloradowic.com) and the U.S. Department of Agriculture (wicworks.fns.usda.gov). We are also currently working with the U.S. Department of Health and Human Services (HHS) Health Resources and Services Administration (HRSA) to manage and enhance the agency's digital presence.

Recent highlights of our health sector work include:

- **County Health Rankings & Roadmaps:** Our team has designed and developed websites and sophisticated data visualizations for nine annual countyhealthrankings.org reports, a project of the University of Wisconsin Population Health Institute and the Robert Wood Johnson Foundation that uses data to show how where people live matters to their health. Our work lets users explore and compare detailed public health information across 65+ health factors

and outcomes for more than 3,000 counties, and find practical steps they can take to improve public health in their local communities via the site's Action Center.

- **Washington All-Payer Claims Database (APCD):** Our team worked in partnership with Oregon Health & Science University's Center for Health Systems Effectiveness, the Washington State Office of Financial Management, and OnPoint Health Data to design and develop the wahealthcarecompare.com, which lets users directly compare healthcare services and costs on measures of quality and value to make more informed choices.
- **National Home Visiting Resource Center (NHVRC):** James Bell Associates (JBA), which has a national reputation for excellence in evaluation and research of innovative health and human services programs, enlisted Forum One to help launch a new brand, a redesigned WordPress website, and a fresh communications strategy for nhvrc.org. The team created a new, go-to resource and engaged community to share comprehensive, reliable data and best practices to improve home visiting programs nationwide to best serve young children and their families.



Forum One has designed and developed nine annual County Health Rankings and Roadmaps reports at countyhealthrankings.org, connecting researchers, health professionals, policymakers, and citizens with actionable data to understand and improve the health of their communities.

3. Higher Education

Our team has delivered successful projects for higher education institutions including Georgetown University, the Johns Hopkins University, the Harvard School of Public Health, the Universities of Washington and Wisconsin, the Massachusetts Institute of Technology (MIT) Museum, and Ashford University. We understand the needs and wants of your users and content managers, and how to engage and obtain buy-in from your stakeholders to craft an effective, audience-centered website that achieves your team's priority goals.

Recent, relevant higher education projects include:

- **Georgetown Institute for Women, Peace, and Security (GIWPS):** Forum One designed and developed a new WordPress website to share the Women, Peace, and Security Index and the stories behind its global data at giwps.georgetown.edu. The Georgetown team can tag and organize site content around their top issue priorities like climate change and combating extremism, collecting resources, videos, events, blog posts, and op-eds around each topic on central issue pages.
- **Johns Hopkins University/USAID Family Planning High-Impact Practices (HIPS):** Forum One worked with the Johns Hopkins Center for Communications Programs, USAID, and other stakeholders to design, develop, and launch fphighimpactpractices.org in WordPress to connect public health workers around the world with tried and tested best practices and resources. We made several improvements driven by how implementers, researchers, and policymakers would use site content on the ground, including presenting PDF content as flexible, easier-to-update longform pieces that live on their own web pages.
- **Chapin Hall at the University of Chicago:** Forum One worked with the Chapin Hall team to redesign and develop the chapinhall.org website in WordPress to better communicate the research organization's impact and connect audiences with evidence-based, actionable resources to improve social services for children, youth, and families. By more clearly communicating the impact and practical application of its research, the new site also better positions Chapin Hall to attract and engage policy and research partners, and secure support for additional research, policy, and data projects.

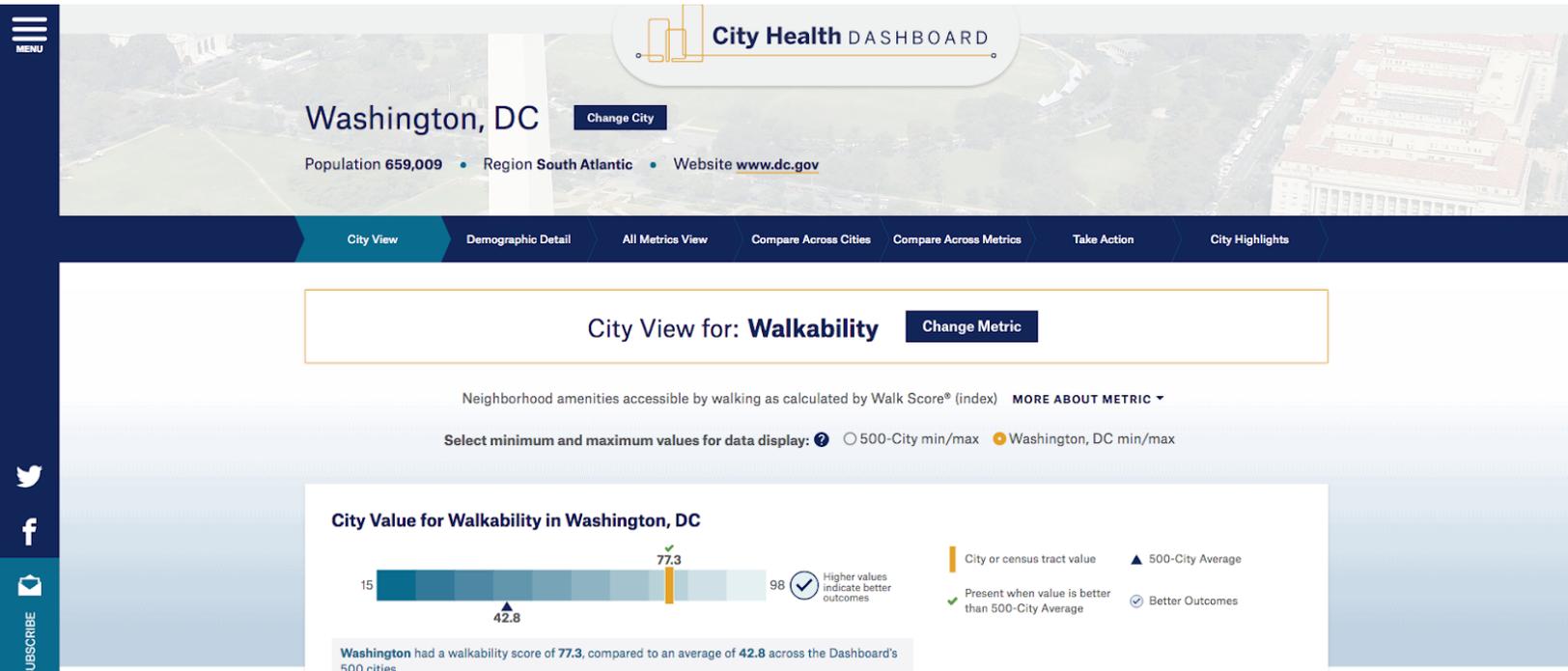


Forum One's work with Georgetown University's Institute for Women, Peace, and Security included application development to share and contextualize an illuminating set of research and data at giwps.georgetown.edu.

4. Application Front- and Back-Ends

Forum One has architected and developed a range of custom, data-driven applications for our clients. Examples of front- and back-end application development include:

- **NYU City Health Dashboard:** Forum One designed and developed the City Health Dashboard application (cityhealthdashboard.com) with NYU Langone Health to share and compare data on 36 measures of public health across the 500 largest U.S. cities. We developed the application in Drupal 8, with a React front-end, and developed the data management processes that power the site. We also developed a robust suite of data visualizations, including D3 charts and graphs, and interactive maps built in Carto, plus custom comparison tools and dynamic “sensemaking statements” that update as users explore the data.
- **Direxion Investments:** Forum One has been supporting Direxion Investments for two years to provide financial services professionals with custom applications to flexibly manage their investment portfolios. We recently worked with Direxion to design, develop, and launch the Portfolio Plus ETFs application (portfolioplusetfs.com), translating specialized requirements and initial concepts into an intuitive and user-friendly online experience. Our team is also currently working to develop an interactive portfolio simulator tool, launching later in 2018.).
- **Lextegrity:** When start-up Lextegrity came to Forum One with an idea for a new digital application that companies could use to better organize their internal legal compliance systems, our team took this product from concept through custom development in just five months through a series of Agile sprints. We developed the SaaS application using the open source Parse server, TypeScript, and React.js. It has several integration points with existing systems and can be customized on per-client basis, and is available in 13 languages.



Forum One developed the cityhealthdashboard.com application to compare and explore data across 500 U.S. cities.

L. Experience Converting Existing Application to New Code Base

L. Describe your firm's experience and/or capacity for converting an existing web-based application client-side functionality to a new code base.

Forum One has the experience and capacity to convert existing web-based applications and functionality to a new code base. Our team has implemented and redesigned digital projects that are either entirely or partially client-side applications that pull data from server-side repositories and content management systems. This includes client-side JavaScript applications, React-based stand-alone applications, and embeddable React-based widgets.

M. Experience with Custom Back-end Management Systems

M. Describe your firm's experience developing customized back-end management systems.

Forum One has designed and worked with custom back-end management systems since our founding in 1996. From developing our own PHP-based CMS to working with PHP frameworks to develop custom back-end solutions, our team relies on the philosophy that we will develop the best possible solutions with available open source technology. Our team has a record of success applying these principles to help organizations like the U.S. Environmental Protection Agency (EPA), Lextegrity, the Center for Global Development, amfAR, and many others.

N. Plan for Maintaining Open Communication

N. Describe the plan for maintaining open communication during project work with the relevant university client.

Forum One will maintain open communication during project work by providing close and regular collaboration with the relevant University client contacts. We use transparent communication channels and system-based management tools to handle ongoing project oversight, including a project management plan, an online project workspace, and regular status updates and reporting. We keep you up to date on project progress with:

- **Reporting and Status Updates:** The project manager will lead weekly and monthly check-ins with project stakeholders. We will review tasks completed, potential risks, budget used, and upcoming tasks. We will deliver a bi-weekly status report that includes updates on budget, schedule, tasks completed, open tasks, and items waiting for feedback/approval.
- **Task Prioritization:** During our status meetings, our team will review the list of tasks, deliverables, or features that need to be completed and prioritize them for upcoming work. We will weigh the costs and benefits and review the upcoming backlog tasks to ensure we are completing all tasks in priority order — as directed by your staff, and guided by the expertise of the Forum One team.

- **Online Project Collaboration:** We manage all documents and make them available for collaboration via a variety of tools, including Teamwork, Jira, and the Google suite of applications. Our joint workspace for the project teams will provide real-time access to project information including deliverables, requested feature lists, web prototypes, and project status updates. Internally, we will also use an online system to track feature status and run quality assurance.
- **Clear Lines of Communication and Accountability.** Our project manager serves as a central point of contact for your team, connecting you with our team's resources and reporting our progress. The project team can reach out to the PM at any time to ask questions, escalate issues, or get advice from our corporate technical leads and experts, and our senior leadership. Our PM reports to an Account Director, who reports directly to Forum One's President and CEO, giving us a clear escalation path for issues and lines of accountability.

O. Additional Services

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

Forum One is a full service digital agency and as such we are able to meet all of JMU's digital needs in-house. We see our organization as not just a vendor at your disposal – we strive to be a partner that can augment your team in a way that feels like an extension of your capabilities.

Sample additional services we provide our clients include:

- Creative Digital & Print Design
- Branding and Positioning
- Content Strategy
- Digital Strategy
- Data Systems Design & Implementation
- Business Intelligence and Data Analysis

We have included hourly rates for personnel in these service areas in the Pricing Schedule of this solicitation.

P. Ability to Provide Training Sessions

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

Forum One can provide training to educators and/or your core team for any of the created applications. Training sessions vary depending upon topic and what needs to be covered. Forum One will provide two training options:

- **In-Person Training:** Each training session includes up to six individuals. The topic and agenda of each training session will be customized based on the application. In-person training will require each individual to be present in the same room with a computer. An agenda and

pre-requisites will be provided before the training. A manual will be provided during or shortly after the training. Our team may record these sessions for any future use.

- **Web-based Training:** This training has the same assumptions as the in-person training, except these are conducted via web. We assume all team members have access to a computer and can log into the web conference software, Zoom. We can also use JMU's preferred conferencing system, if required. A recording of the training will be provided for any future use.

The overarching goal of our training is to set your teams up to successfully operate, maintain, update, and grow your applications and team capabilities going forward. We take a "train the trainer" approach to equip your staff to carry this knowledge forward, supported by clear and useful training materials and documentation to let you get the most out of the new site

Q. Ability to Present Innovative Ideas

Q. Describe your firm's ability to present innovative ideas for application updates/creation. Include details on branding strategy experience.

We consider ourselves a partner to our clients, and our ability to present creative and innovative solutions to meet unique challenges and opportunities is an important differentiator of ours. We know that any time we update an existing application or create a new experience, there is an opportunity to make it better for its users and to push it to be more effective. Given our multi-faceted and multi-disciplined approach, the innovative concepts we develop with our clients are often informed by strategic, analytic, design, and technical thinking.

Forum One has worked with numerous clients to develop new brands and brand implementation strategies to better communicate with their audiences, including recent work to build brands for the National Coalition of STD Directors (ncsddc.org) and the National Home Visiting Resource Center (nhvrc.org). This has included logo and color palette development, brand messaging and positioning, and rollout strategies. We have also worked extensively to extend existing brands to digital spaces and define how audiences interact with brands online.

R. Process for Issue Resolution

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

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

Upon submission of the issue from the JMU team, we will confirm submission of the issue. Our team will quickly evaluate the provided issue, asking for clarification where needed. Upon evaluation and

depending on the severity of the issue, our team will either work to resolve the issue immediately in high-priority situations or communicate a solution and effort level to JMU for a decision on how to move forward. Once a course of action is determined, our project manager will communicate a projected timeline and provide updates as the issue is resolved.

S. Method for Service and Maintenance of Application

S. Describe how your firm would propose to assist the University with service and maintenance of application(s).

Forum One has unique and industry-leading experience, a deep commitment to societal improvement, and a longstanding record of success on projects with similar groups. An open source leader, Forum One's robust support team will:

- Tailor our processes around your needs and field of expertise;
- Staff the project with people who care and know about your issues; and
- Work as true partners with your team from the beginning to the end of the project.

Tasks include:

Review and Audit

At the start of our engagement with JMU, and as part of our onboarding process, our team requires a comprehensive review and audit of the servers, website, and mobile applications code. The review and audit include:

- Overall code review
- Review of plugins and current configuration
- Recommendations for improvements to code architecture
- Security review
- Review hosting environment
- List of problems/issues that may need to be addressed as part of an ongoing support agreement
- Deliverable: Audit Summary Memo summarizing findings
- Meeting to review Audit Summary Memo

Fully Managed Website Hosting and System Administration

Forum One offers website hosting in a Cloud-based environment. This fully managed hosting support package includes monthly system administration services and website monitoring 24 hours a day, seven days a week. Forum One's technical experts will work with client staff over time to determine the appropriate hosting infrastructure and configuration necessary to support expected site traffic, backup needs, and failover and disaster recovery systems.

Forum One will provide Amazon EC2 Linux Cloud Server(s) for the application. Forum One system administrators also spend on average four hours monthly carrying out routine tasks as outlined below. Should the client site(s) or server(s) require additional work, Forum One will notify the client in

advance of carrying out such tasks or work. Clients' dedicated servers are managed via our partnership with Amazon Web Services (AWS).

System Administration Tasks

- **Backups:** Backups, retained for a rolling 60-day period
- **Monitoring:** 24/7/365 uptime monitoring
- **Analysis:** Examining and analyzing web log and server log files
- **Hardware and Software:** Adjustments to server hardware and software configurations
- **Security:** Firewall implementation

Solution Details

The exact hardware and software specifications for our proposed hosting solutions are TBD depending on JMU's specific requirements. A custom hosting solutions can be designed and priced for JMU. Cost ranges are included in our Pricing Schedule.

Included Tasks and Activities

- **Configuration Management:** Forum One uses SaltStack configuration management software to provision and manage all Cloud services.
- **Repository Hosting:** GitHub is a web-based version control repository. Forum One may utilize GitHub to store the code base.
- **Backups/Disaster Recovery:** Backups of databases, site codebase and files, and system configuration are automated and scheduled nightly. Restores are initiated upon client request or by Forum One request, and completed based on the amount of data to restore. Seven days of database backups are retained locally, as well as copied to off-site storage. Forum One uses rsync.net services to provide 60 days of off-site backups, which are stored on rsync.net's own servers.
- **Monitoring:** Forum One will monitor the server(s) 24/7/365. Best-effort corrective action will be taken immediately following a monitoring alert with issues typically resolved within one hour. The monitoring system can be configured to alert client contact(s) in addition to Forum One staff. Uptime reports can automatically be emailed to the client contacts on a set schedule. Additional monitoring reports are available.
- **Security:** Forum One will ensure the appropriate software firewalls are implemented on each component of the Cloud Server configuration. Additionally, Forum One will help facilitate any security evaluations the client chooses to perform independently.
- **Service Level Agreements (SLAs):** Forum One extends to the client the service level agreements set forth by Amazon:
 - aws.amazon.com/ec2-sla
 - aws.amazon.com/rds/sla (where applicable)
 - aws.amazon.com/s3/sla (where applicable)

Ongoing Support and Maintenance

Forum One will provide JMU with technical support for minor modifications, improvements, bug fixes to the site, check-in calls, and project management. JMU may use up to 24 hours/quarter for support for various applications. The number of hours can be increased depending on the tasks required. Based on our understanding of your needs, we have included our base price within our quote; however, we believe JMU will likely require an increased package to cover support for both the custom Vision of You application and any mobile applications. Unused hours do not roll over to subsequent

quarters. Forum One will respond to all tickets submitted via the the tasks management system within one business day for non-urgent issues during regular business hours for technical support (M-F, 9-6 ET). Support hours may be used for:

- Modifying existing content types and block functionality
- Fixing bugs
- Managing user permissions and troubleshooting user issues
- Adding new content views
- Providing oversight and development review of work completed by JMU staff
- Regression testing or quality assurance testing of work completed by JMU and Forum One
- Implementing new features
- Making mobile application updates
- Monitoring of mobile applications on app stores

WordPress Core and Plugin Updates and Patching

For any website running WordPress, Forum One will provide proactive website maintenance by ensuring that security updates and patches for the WordPress core and plugins are applied monthly. Forum One will carefully review all of the available updates, apply security-related updates, and apply any other updates that will improve the functionality. Monthly maintenance and security patching includes:

- Review of available plugin and WordPress updates and patches
- Installation of patches to the development instance, followed by a QA review of the site
- Live deployment of security and other updates to the site, followed by a final QA of the site

T. Application Security Features

T. Describe the application security features for data.

Forum One takes security very seriously. As such, we adhere to industry best practices for application and data security. This includes ensuring that communication between the client and server sides is properly encrypted and secure. Additionally, we utilize both manual and automated methods to analyze code and detect security defects and vulnerabilities prior to production releases. Finally, when utilizing contributed components such as modules or plugins, we ensure those entities are secure and are regularly reviewed for patching and security updates as they are released.

U. Approach to Test and Production Environments

U. Describe your approach to test and production environments.

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

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

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

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

V. Hosted and Data Storage Services

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

Forum One offers customizable managed hosting packages, in which we host digital services for many of our clients. Our managed offerings are hosted with Amazon Web Services and are actively monitored and maintained by Forum One system administrators.

We also maintain a strong relationship with Pantheon hosting services and have created development operation packages that integrate seamlessly with their hosting workflow.

2. About Forum One

Forum One is a full service agency that works with mission-driven organizations to create the stunning designs, smart messaging, and custom-built technology tools they need to realize their goals and change the world.

We are a team of more than 100 technical and creative professionals, including top developers in the open source community, award-winning designers, and experts in understanding user needs and crafting compelling digital experiences. We serve clients all over the world with offices in Alexandria, VA (HQ); Washington, DC; Seattle, WA; and Cologne, Germany – plus key staff across the U.S.

Our team has achieved real results on more than 2,000 digital strategy, creative, technology, data, and user experience activities for 750+ issue-focused organizations since our founding in 1996.

We're bringing Agile innovation and modern design to the public sector. We helped Peace Corps reimagine its web presence to deepen its impact in a changing world. We designed the online experience for the Smithsonian National Museum of African American History and Culture, which won two 2017 Webby Awards. Our bold design for the U.S. Global Change Research Program started a national conversation and renewed action on climate change. We redesigned and re-architected the open source web presence for Fairfax County Public Schools, the tenth largest public school system in the nation. We put Agile solutions into practice at USAID, the U.S. Environmental Protection Agency; the Departments of Agriculture, Education, Energy, and Health and Human Services; and the National Endowment for the Humanities.

Our core services include:

- **Digital Strategy:** Our solutions span our clients' messaging, websites, online communities, social media, mobile technology, and integration with events and other communications.
- **Creative:** We offer visual design, content strategy, and user experience services in responsive web design; video production; print collateral; social media messaging; and gamification.
- **Technology:** We have more than 20 years of experience building user-centric websites, web applications, and mobile apps with leading-edge open source tools and platforms. Keywords we like: Agile, Drupal, WordPress, responsive, mobile, and cloud.
- **Data:** We help manage, visualize, and share data online. We create striking and compelling maps, charts, infographics, and interactive data visualizations to bring your issues to life.
- **Analytics:** Our analytics strategy lets you monitor your content and make informed, data-driven decisions to reach your goals, from entry-level setup and custom reporting to advanced implementations and API integrations.
- **Support:** Our dedicated team offers cloud hosting management, technical support, 24/7 security monitoring and response, staff training, and site impact tracking services.

3. Pricing Schedule

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

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

The following sections outline our proposed rates, costs, and fees that would apply for any future purchase order for our work with JMU. These costs are based on our current understanding of the scope of work and our work on similar projects. Through the delivery of each order, our team will regularly update JMU staff on the status of the budget. All travel will be billed at cost and estimates are included in the tables that follow.

A. Labor Categories and Rates

Fees for services are calculated based on the following labor rates:

PROJECT MANAGEMENT

Junior Analyst: \$90
Analyst: \$100
Project Coordinator: \$130
Quality Assurance Analyst: \$150
Project Manager: \$160
Senior Project Manager: \$185
Project Director: \$195
Senior Project Director: \$210

CREATIVE

Junior Designer: \$110
Copywriter: \$150
Creative Strategist: \$160
Designer: \$165
Senior Creative Strategist: \$195
Senior Designer: \$200
Art Director: \$210
Creative Director: \$230

ACCOUNT MANAGEMENT

Account Director I: \$195
Account Director II: \$210
Senior Account Director I: \$215
Senior Account Director II: \$250

FRONT END DEVELOPMENT

Associate Front-end Developer: \$120
Front-end Developer: \$160
Senior Front-end Developer I: \$200
Senior Front-end Developer II: \$210

USER EXPERIENCE

User Experience Associate: \$120
User Experience Designer: \$160
Senior User Experience Designer: \$200
User Experience Director: \$210

TECHNICAL

Associate Developer: \$140
Technical Support: \$150
Developer: \$165
Senior Developer: \$200
Technical Architect I: \$210
Senior System Administrator: \$210
Technical Architect II or Strategist: \$230
Technical Director: \$240

ANALYTICS

Analytics Associate: \$90
Analytics Analyst: \$160
Analytics Director: \$200

B. Training Costs

Task	Hours	Cost
In-Person Training	One session, 6 people max, includes training materials and recording (if possible)	\$9,600
Web-based Training	One session, 6 people max, includes training materials and recording	\$6,400

C. Ongoing Support and Hosting Costs

Task	Est. Hours	Est. Cost
Audit and Onboarding	40	\$7,400
Migration to Forum One Hosting	20	\$3,700
Hosting and System Administration for Development Production	N/A	\$3,500 - \$5,000
Monthly Core and Security Updates	N/A	\$1,800/quarter
Technical Support (24 hours / quarter)	24 hours / quarter	\$4,440/quarter

D. Other Direct Costs

Task	Description	Cost
Travel to JMU	Mileage to JMU (280 miles round trip)	\$152.60 per trip

4. Attachments

Attached please find:

- Attachment A: Offeror Data Sheet
- Attachment B: Small, Women, and Minority-owned Business (SWaM) Utilization Plan
- Attachment C: Sample Forum One Resource Resumes

Attachment C: Sample Forum One Resource Resumes

Keenan Holloway, Technical Architect

EDUCATION

- **Tuskegee University**, B.S. in Computer Science, Washington, DC, 2004

CERTIFICATIONS

- Acquia Certified Developer – Drupal 8 (2018)

PROFESSIONAL EXPERIENCE

Forum One, Technical Architect and Web Developer, Washington D.C., March 2012 – Present

- Leads technical development project teams to architect, deliver, test, and implement quality, innovative technical solutions to achieve business goals on time and within budget.
- Develops websites in Drupal 8, WordPress, and other leading open source technologies.
- Built custom code for the Center for Global Development Website redesign, including content types and tools, including a hybrid eNewsletter.
- Provided technical oversight and web development for a variety of projects and clients including the ASPCA, Robert Wood Johnson Foundation, Conservation Fund, and more. He provides technical recommendations specific to hosting environments, application server requirements, and functional specifications.
- Contributes development and maintenance work to other cause driven projects including County Health Rankings and Roadmaps, the online community, Assess4Ed, and the Rockefeller Brothers Fund.
- **Project: GlobalChange.gov Redesign - U.S. Global Change Research Program**
 - Served as technical lead for the redesign and relaunch of globalchange.gov, concurrent with the release of the third National Climate Assessment.
 - Led team of 10 to design and develop an entirely new organizational website, while managing the integration of the independently-developed NCA content.
 - Planned and executed a hosting strategy for the report release that successfully managed over a quarter-million site visitors in the first 48 hours.
- **Project: U.S. Department of Agriculture (USDA) National Institute of Food and Agriculture (NIFA) Redesign**
 - Served as technical lead for the redesign and relaunch of the National Institute of Food and Agriculture (nifa.usda.gov). The resulting website has simplified their IA, and features a modern, flat design inspired by some of NIFA's own in-house collateral. It emphasizes NIFA's grant-driven work through its programs, funding opportunities, and topics of expertise. The site featured a liberal use of taxonomies and faceted searching which were important to our clients' goal of a 'unifying' information.
- **Project: USDA WICWorks Resource System**
 - Serves as the technical lead for Forum One's work to redesign and develop the WICWorks Resource System in Drupal 8 to better serve target audiences and Government content managers with a task-driven structure and responsive, accessible best practices for coding.

- **Project: South Carolina Department of Health and Environmental Control (DHEC)**
 - Serves as the technical lead for a large-scale Drupal 8 project to redesign and develop the DHEC website, leading Forum One's development team in our work with State stakeholders to develop innovative and high quality open source solutions

Office of the Chief Technology Officer (OCTO), Web/Application Developer, Washington, DC, October 2004 - March 2012

- Developed and maintained numerous programs and online applications for multiple government agencies and maintained agency websites.
- Operated hand-in-hand with a team of developers and editors in a multi-staged development, Agile environment with daily Scrum meetings.

Office of Network Security and Bioethics Web Master, Contractor, 2004 – 2004

- Provided promotional media, program research and accounting management systems.

Booz Allen Hamilton, Developer, Washington, DC, June 2003 - January 2004

- Provided desktop support and site supervision to users in various offices
- Responsible for daily monitoring of the network and administration of all computer related trouble tickets.

U.S. Environmental Protection Agency (EPA), Intern, Washington, DC, June 2000 - June 2003

- Developed and maintained the Office of Emergency Prevention, Preparedness, and Response website. Developed software and document libraries for public and private use.

SKILLS

- **Content Management Systems:** Drupal (6 & 7), Drupal Custom Modules, Joomla, WordPress, Open Text, Dynamic Site Framework
- **Programming Languages:** Java, C/C++, Assembly, JSP, ASP/C# .Net, PHP, JavaScript (Classic, AngularJS, D3, JQuery), Ajax, Coldfusion, Soap, Flash Actionscript
- **Databases:** MySQL/SQL, XML, Oracle, Filemaker, Java Random Access Files
- **Design:** HTML/CSS, Graphics/Animation, Dreamweaver, Flash, Photoshop, Illustrator, Fireworks, Google Applications, Agile Development Software Development life cycles/stages.

Kelsey Hicks, Design Lead

EDUCATION

- **University of Dubuque**, Dubuque, IA, Bachelor of Science in Computer Graphics and Interactive Media, 2006

PROFESSIONAL EXPERIENCE

Forum One, Senior Designer, Ithaca, NY (remote), April 2015 - Present

- Creates eye-catching, high-quality design pieces for Forum One's clients and internal and external marketing and branding efforts
- Designs and produces branding and marketing collateral including illustrations, social media graphics, print fliers, slip sheets, multi-page booklets, proposal and report layouts, email templates, and animations
- Conceptualizes and delivers branding, identity design, copywriting, and integrated campaigns
- Applies design principles and best practices to engage target audiences, create high-impact

web designs and creative materials, and create the best possible audience experience

- **Project: USAID EducationLinks**
 - Designed edu-links.org in Drupal 8 to serve as a central resource for USAID offices and development professionals working to improve education around the world.
- **Project: USDA WIC Works Resource System**
 - Designed the new wicworks.fns.usda.gov website in Drupal 8 to connect audiences with actionable resources.
- **Project: RTI Global Gender Center**
 - Designed the new gendercenter.rti.org to connect users with leading experts and practical resources to help improve the lives of women and girls around the world.
- **Project: Project HOPE**
 - Designed a new, responsive website at projecthope.org to drive donations and engagement and highlight the organization's impact around the world
- **Project: Global Book Alliance**
 - Working with USAID and TRG, designed and developed a distinctive brand identity to apply across the Books for Every Child digital and print collateral.
 - Created a brand guide book, and marketing booklets and handouts in English and French.
- **Project: World Wildlife Fund REDD+ Report**
 - Designed and developed a beautiful report layout and template for the WWF's Reducing Emissions from Deforestation and Forest Degradation (REDD+) report. Carefully crafted the report's user experience by creating easy to read, color-coded callouts and headings. Provided WWF with a reusable template to bring visual design consistency to future reports.
- **Project: Global Health Strategies**
 - Designed the WordPress website at globalhealthstrategies.com to help this New York-based global health and development company communicate effectively and advocate for vulnerable populations around the world.
- **Project: Global Impact**
 - Provided graphic design for Global Impact's 2016 Annual Report and impact summary brochure, designing layouts, original infographics, pull quotes, and design elements in collaboration with project stakeholders to communicate key points.
- **Project: Frontier Group *A New Way Forward***
 - Designed print and online reports illustrating connections between climate change and transportation, to build awareness and momentum around the issues with a print report, including logo design, colors, and typography.
 - Frontier Group used the resulting assets and report design template for all events and collateral around the report, like fact sheets, building a cohesive brand experience.
- **Project: Million Hearts Campaign**
 - Designed branding collateral and online materials for the Million Hearts Cardiovascular Risk Reduction Model, a project with the University of Chicago National Opinion Research Center (NORC) for the Centers for Medicare and Medicaid Services. As part of the rebranding effort, designed logos, one-pagers, social media and industry-specific ads, Twitter and Facebook content, digital newsletters, and webinars to successfully increase applications to the Million Hearts program
- **Project: HealthCompass**
 - Provided design support to the HealthCompass (thehealthcompass.org), a project of Johns Hopkins University and the U.S. Agency for International Development (USAID)

to create an interactive platform collecting the best Social and Behavior Change Communication (SBCC) resources

Danny Did Foundation, Graphic Designer, Chicago, IL, Oct. 2010 - May 2015

- Art direction and design for various events including marketing and event collateral, social media images, and website images

Solution Marketing Services, Senior Designer and Project Manager, Chicago, IL, May 2012 - Oct. 2014

- Worked closely with the CEO to develop branding and identity design, copywriting, promotional campaigns and client launch strategies
- Helped design and develop software to manage the workflow and billing process
- Managed print and design requests and cross media marketing solutions for Vita Coco and their distribution chains in national and international markets
- Worked with the Archdiocese of Chicago to create branding and logo designs for schools

Centiv (now Brandmuscle), Senior Designer, Chicago, IL, Nov. 2007 - April 2012

- Oversaw the launching of new markets from concept to finish for a large national products distributor
- Worked closely with salespeople and brand managers to develop creative concepts that adhered to the strict brand guidelines while adding strength and awareness to their brands in the marketplace
- Created marketing material such as posters, banners, table tents, menus, and postcards
- Trained and managed a team of 4 in-house designers and 2 design coordinators
- Assisted in hiring, training and managing a team of 46 on-site designers and design coordinators
- Worked closely with internal management team, software development group, accounting department, vendors and sales force to define procedures and ensure successful day-to-day operations

SKILLS

- Adobe Photoshop, InDesign, Illustrator, Acrobat, Bridge, Dreamweaver
- Pantone Matching System
- HTML, CSS, Bootstrap, Foundation, JavaScript, WordPress, Webflow
- Mac, PC, MS Office, Project Management

Sara Tetreault, Creative and Content Strategy Lead

EDUCATION

- **University of Sussex**, Falmer, East Sussex, England, Master of Arts, Early Modern Culture and Literature, September 2006
- **Eastern Connecticut State University**, Willimantic, CT, Dual Bachelor of Arts, English and Communications, May 2004

PROFESSIONAL EXPERIENCE

Forum One, Creative Strategy Director, Alexandria, VA, January 2015–Present

- Leads analysis of organizational and communications needs and designs technical communications strategies to meet clients' goals.
- Plans and coordinates all project activities and manage client communications.

- Advises clients on online strategy approaches, specifically content strategy and marketing.
- Helps support business development efforts with new and existing clients.
- Specializes in health policy communications, particularly areas such as population health management, medical group management, and clinical quality.
- **Project: National Home Visiting Resource Center**
 - Guided the project team through messaging and communications strategy to rebrand and grow nhvrc.org, a project of James Bell Associates to create a go-to resource for comprehensive, reliable data and compelling narratives on home visiting programs nationwide.
- **Project: Centers for Medicare and Medicaid Services - Million Hearts**
 - Led branding and messaging for the Million Hearts Cardiovascular Risk Reduction Model, a national initiative, co-led by the Centers for Disease Control and Prevention and the Centers for Medicare and Medicaid Services (CMS) on behalf of the U.S. Department of Health and Human Services, with an ambitious goal to prevent 1 million heart attacks and strokes by 2017. Led Forum One's work on messaging, creating collateral for specific audiences, and launching a large-scale social media campaign with industry-specific ads on Twitter and Facebook, digital newsletters, radio scripts, and webinars.
- **Project: She Should Run Incubator**
 - Led creative strategy, branding, and messaging activities to launch incubator.sheshouldrun.org, to give more women the resources they need to run for public office
- **Project: Global Impact - Growfund**
 - Managed branding development for Growfund platform and guided creative direction for naming, branding, and marketing design of new product
 - Guided microsite development and user experience of the landing page
- **Project: United for News**
 - Worked with Internews to brand, design, build, and launch unitedfornews.org to promote access to accurate, quality local media coverage around the world.
- **Project: National Committee for Quality Assurance (NCQA)**
 - Managed three projects to increase usability of NCQA products and design associated web pages

The Advisory Board Company, Associate Director, Content Marketing, Washington, DC,
April 2013–Jan. 2015

- Developed and designed marketing collateral for performance technology products including clinical- and business-related offerings.
- Created custom presentations to address clinical issues specific to the prospect organization.
- Worked with product marketing team to create quarterly marketing plans and target areas of opportunity.
- Addressed sales team requests for collateral and determine, with other team members, the most effective form of communication.
- Created messaging for physician outreach through channels such as webinars, conferences, print collateral, blogs, and social media.
- Wrote and edited marketing copy for one-pagers, brochures, evaluation guides, presentations, proposals, and case studies.
- Produced member testimonial videos and member stories for prospect meetings and webinars.

The Brookings Institution, Communications Manager, Washington, DC, Oct. 2011–April 2013

- Wrote and managed Engelberg Center for Health Care Reform communications approach for social media, web, and media outreach.
- Managed web assistant and oversaw all Engelberg Center web content including design and development of new websites.
- Edited and designed research papers, case studies, event collateral, presentations, talking points, and press releases.
- Collaborated with event staff to brand event collateral, ensure editorial quality of materials, and develop event communications.
- Researched and drafted editorials, columns, and other opinion pieces for senior staff.
- Sought new funding opportunities for Engelberg Center programs.

National Association of County and City Health Officials, Washington, DC, Communications Specialist, Jan. 2011–Oct. 2011, and Editorial Associate, Jan. 2009–Jan. 2011

- Edited and produced page layout and graphic design for publications such as reports, fact sheets, postcards, and flyers.
- Created original copy for e-newsletters, marketing materials, and other membership-related publications.
- Used Twitter, Facebook, blogs, and other social media channels to market publications and public health-related topics.
- Worked with event planning team to create social media and marketing around industry-related events.
- Managed bi-monthly e-newsletter that went out to approximately 8,500 members.
- Edited and designed employee newsletter and managed small group of contributing editors.

Océ North America, Marketing Communications Specialist, Trumbull, CT, Feb. 2007–Jan. 2009

- Generated taglines and themes for marketing campaigns and managed the consistency of campaign materials and copy.
- Maintained and upheld house style in terms of editorial and design elements.
- Wrote and edited copy for marketing materials including success stories, executive letters, promotional items, product brochures, press releases, white papers, and flyers.
- Managed distribution and creation of Monday Morning Meeting PowerPoint.

SKILLS

- Development and execution of marketing and communications plans and strategies.
- Understanding a product's distinct selling point, determining positioning and branding, and crafting voice.
- Using web and social media to achieve marketing initiatives.
- Collaborating with product marketing and event planning teams to optimize overall marketing efforts and outcomes.
- Expert-level knowledge of InDesign, Photoshop, Illustrator, Dreamweaver, HTML, Microsoft Office, and Salesforce.
- Editing documents for style and grammar; comprehensive knowledge of APA, AP, Chicago, and NYT style.

Chaz Chumley, Front-end Development Lead

EDUCATION

- **University Of Phoenix**, Phoenix, AZ, Bachelors of Science and Information Technology, 2000-2004

CERTIFICATIONS

- Certified Scrum Master

PROFESSIONAL EXPERIENCE

Forum One, Technology Manager, Alexandria, VA, Aug. 2013 - Present

- Provides technical oversight and web development for a variety of projects and clients, including technical recommendations specific to hosting environments, application server requirements, and functional specifications.
- Responsible for defining complex technical architecture for Drupal and WordPress websites, overseeing teams of developers, conducting code review and audits, defining and contributing to requirements analysis, and providing senior technical leadership.
- Leads Forum One's Drupal 8 development efforts, including websites for clients like Fairfax County Public Schools, and the relaunched forumone.com
- Contributes to the Scrum team in providing overall technical leadership, works to define requirements for other technical staff and to ensure requirements align with customer expectations.
- Maintains Forum One's contributed Drupal modules and custom WordPress plugins (WP-CFS, WP-CFM, and FacetWP) and manages open source sites
- **Project: Fairfax County Public Schools (FCPS) (fcps.edu)**
 - Architected and developed a new Drupal 8 web presence for FCPS – the tenth largest public school system in the country – and its family of 200+ websites, optimized for mobile and equipped with translation in eight languages.
 - This full-scale overhaul includes Drupal 8 architecture, design, development, content migration, and ongoing support for a site that serves 186,000 students, 24,000 full-time staff, and hundreds of content managers.
- **Project: USAID - Global Innovation Exchange (globalinnovationexchange.org)**
 - Community website for Innovators, Collaborators and Funders to help solve the world's most challenging problems
 - Architected and developed large community platform in Drupal 7 utilizing Apache Solr Search, social login and registration, and custom Solr queries
- **Project: American Red Cross - Global Disaster Preparedness Center (preparecenter.org)**
 - Community website for first responders to collaborate, share and crowdsource disaster preparedness information
 - Architected and developed large community platform in Drupal 7 and Solr along with custom module development

Saforian, Director of Engineering, Washington, DC, Nov. 2012 - Aug. 2013

- Responsible for managing a team of Open Source engineers and facilitating best practices of Drupal configuration, administration, theming and development. Keeping an active focus in the community and introducing best-fit technologies as needed.
- Drupal 6 and 7 Site Administration and Theming

- LAMP Architecture and management
- Scrum Master for Agile Development
- Customer relations specialist

Lynda.com, Author, Santa Barbara, CA, Jan. 2012 - present

- Responsive Design with Drupal 7
lynda.com/Drupal-tutorials/Responsive-Design-Drupal/107419-2.html
The course starts with setting up the Drupal environment in Acquia and defines some basic principles of responsive design before moving on to creating a new Drupal theme with fluid layouts, fluid media, and responsive tables and forms.
- Drupal 7 Creating and Editing Custom Themes
[.lynda.com/Drupal-7-tutorials/Creating-and-Editing-Custom-Themes/86650-2.html](http://lynda.com/Drupal-7-tutorials/Creating-and-Editing-Custom-Themes/86650-2.html)
The course explores how Drupal default themes are configured and structured and how to install and edit a theme. The course also explores the tools a designer needs to create a Drupal 7 theme, using HTML, CSS, PHP, and Drupal templates, or migrate an existing Drupal 6 theme to Drupal 7.

The Smithsonian Institution, Open Source Engineer, Washington, DC, Aug. 2009 - Nov. 2012

- Responsible for managing LAMP architecture and Drupal framework with emphasis on scalability, performance and security needs. Liaison for Smithsonian to facilitate Open Source requirements, including educating them in Drupal Site Administration and Theming. Served as Drupal Evangelist leading the direction of open source in the museums to facilitate best practices with Acquia, Pantheon and third party vendors.
- Worked closely with museum website and content producers to develop specifications, resources and standards for both Windows and LAMP architectures.
- Participated in technical evaluation of proposals for outside vendor support.
- Served as content expert in all Adobe Products, Drupal CMS, open source databases and user interface development utilizing AJAX and RSS aggregation.
- Established architectures for standards-based code development to adhere to all Smithsonian Institution standards and security.

Lucidus Corporation, Senior Application Developer, Keene, NH, Aug. 2006 - May 2009

- Responsible for application, web, database, design, content management, SEO and open source technologies including Linux, Apache, MySQL, PHP, ColdFusion and Drupal.
- Communicated directly with clients to determine requirements and business rules to define project deliverables and project timelines for open source standards.
- Offered guidance on best use of Linux, Apache, MySQL, PHP and Drupal platforms for small to large scale implementations
- Specialized in Drupal theming, configuration and installation.
- Experienced in SDLC and Agile Scrum methodologies.

PUBLICATIONS

- Author, *Mastering Drupal 8*, Packt Publishing, July 2017
- Author, *Drupal 8 Theming with Twig*, Packt Publishing, Dec. 2015

SKILLS

- Drupal 6/7/8
- WordPress

- PHP (Object Oriented PHP)
- MySQL
- ColdFusion
- SQL Server
- HTML5/CSS3
- Photoshop/Fireworks/Sketch
- JavaScript/AJAX
- SEO

Alex Ford, Back-end Development Lead

EDUCATION

- University of North Carolina, Bachelor of Arts, Mathematics, Asheville, NC, 2009

PROFESSIONAL EXPERIENCE

Forum One, Technical Engineer, Alexandria, VA, January 2013 - Present

- Supports all aspects of the development cycle, including coding, information architecture, and functional requirements definition.
- Helps organizations including the U.S. Department of Agriculture; the U.S. Global Change Research Program; amfAR, the Foundation for AIDS Research; and the National Assessment of Educational Progress realize their web redesign and data visualization goals.
- **Project: Florida Department of Environmental Protection**
 - Currently serving as lead developer to redevelop the Agency's website in Drupal 8.
- **Project: National Assessment of Educational Progress**
 - Developed interactive data-driven visualizations, ensuring accuracy of data presentation and cross-browser compatibility.
 - Designed and guided implementation of an API to deliver student performance data to browser clients, ensuring security of embargoed data.
- **Project: Center for Strategic and International Studies**
 - Developed content migration using the Drupal Migrate module
 - Created service_container-based OAuth2 client configuration management system
- **Project: amfAR PEPFAR Country Operational Plans (COPs) database**
 - Developed timeline visualization displaying all of PEPFAR's funding mechanisms over time for a given country
 - Helped guide UX direction by developing functionality prototypes
- **Project: GlobalChange.gov**
 - Provided Drupal development support
 - Wrote Perl web-scraper script in order to assist with content import from old static gallery
 - Implemented FISMA moderate security controls
 - Created interactive map from client-provided SVG file
- **Project: USDA Farm to School Census**
 - Developed graphical elements in Drupal summarizing survey responses from schools across the nation
 - Automated creation of snapshot images for offline use with PhantomJS

NationalField, Developer, Washington, DC, 2012

- Supported over 450 private social network application instances by providing feature upgrades, bug fixes, and security enhancements.
- Designed and implemented functionality for hashtags in user content.
- Audited application code and database structure for migration from legacy Latin-1 character set to Unicode.

Pear Analytics, Developer, San Antonio, TX, 2010-2012

- Developed and documented internal service to analyze single webpages for common SEO mistakes and report on them.
- Created analysis service to rapidly examine entire websites and create reports based on findings.
- Developed internal toolset to aid coworkers in data-gathering and reporting tasks.

SKILLS

- JavaScript frameworks:
 - D3.js
 - Angular
 - Backbone
 - RequireJS
- Server-side frameworks:
 - Drupal
 - Express
- Programming Languages:
 - TypeScript
 - ECMAScript (JavaScript)
 - PHP
 - SQL

Molly Mattessich, Project/Program Manager

EDUCATION

- **Johns Hopkins University**, Master of Arts, Communication, 2014
- **Wellesley College**, Bachelor of Arts, Psychology, 2001

CERTIFICATIONS

- Certified ScrumMaster, 2015

PROFESSIONAL EXPERIENCE

Forum One, Practice Director, Alexandria, VA, 2014 - Present

Previous Position: Senior Project Manager

- Serves as a strategic partner with clients to manage and serve as Scrum Master on a large portfolio of website design, development, and digital communications projects
- Plans and manages the delivery of multiple concurrent web projects
- Leads Forum One's "rapid delivery" practice to deliver high quality, open source websites on time and on budget with a small, Agile team
- Develops detailed project schedules, status reports, and projections
- Manages client and internal expectations around budget, scope, and schedule
- Develops and nurtures client relationships

- Manages team members' participation and the delivery of project commitments
- **Project: Peace Corps**
 - Managed website development process for the new peacecorps.gov, including three-month Discovery phase, incorporating designs into Peace Corps' new brand identity, and content migration
 - Led Forum One's work with Peace Corps to extend its updated logo and visual identity system into a completely refreshed and redesigned website that is bold, user-friendly, and makes Peace Corps' content more accessible and inspiring to the new generation of volunteers.
 - Managed relationship with external development vendor, Excella, to build new website on the Python/Django system
 - Helped Peace Corps increase the number of qualified applicants: the average number of applications started per month doubled in the first four months after launching the new site relative to the previous four months. Peace Corps' ForeSee satisfaction scores also increased after the site redesign, site engagement increased, and Peace Corps continues to see multiple improvements across site metrics.
 - Continues to lead Forum One's ongoing work across 10 task orders to date under the Peace Corps Blanket Purchase Agreement (BPA) to make additional improvements and enhancements to the new website to shape an online experience that not only speaks to a new generation of Peace Corps volunteers, but helps the organization make measurable impact in an ever-changing world.
- **Project: USDA Food and Nutrition Service (FNS) - Farm to School Census**
 - Under this multi-year BPA, managed the launch of a new website to share the results of the 2015 Farm to School Census of school districts, with features that include "search for my district" and data visualization, mapping, and infographics at farmtoschoolcensus.fns.usda.gov
- **Project: Center for Strategic and International Studies (CSIS)**
 - Managed Discovery Phase to produce a digital strategy for a new website for CSIS, identifying budget ranges for various packages. Project included messaging architecture, identity pillars, content recommendations, as well as design and technical architecture for the new site at csis.org
 - Managed Website Development Phase including new designs, content migration, and YouTube and Soundcloud integrations
 - Worked with multiple vendors to integrate Salesforce CRM with new website
- **Project: Save the Children**
 - Managed the project to redesign, rebrand, develop in WordPress a site for the International Development and Early Learning Assessment (IDELA). The site, idela-network.org, provides information and a tool for direct child assessment that measures motor development, emergent language and literacy, emergent numeracy, and social-emotional development.
- **Project: Independent Sector**
 - Managed Discovery, Strategy, and Development phases of project to redesign and rebuild a new website for IS at independentsector.org
- **Project: National Home Visiting Resource Center (NHVRC) - James Bell Associates**
 - Managed the project to redesign, rebrand, develop in WordPress, and launch nhvrc.org, a comprehensive resource on the status and impact of home visiting programs nationwide to serve children and families.
- **Project: Medicaid and CHIP Payment and Access Commission (MACPAC)**

- Managed the project to complete a web redesign and complete rebranding for MACPAC at macpac.gov. Managed the team to create a new, modern, authoritative and data-focused visual identity, including a new logo, and applying this new branding across MACPAC's print materials, ranging from business cards to printed reports to signage
- **Project: The Global Facility for Disaster Reduction and Recovery (managed by the World Bank), Understanding Risk**
 - Managed the launch of a new website for organization, understandrisk.org, that brings together a global community of risk mitigation practitioners
 - Managed delivery of additional content migration work, including providing quality assurance for over 350 pieces of content

Volunteers for Economic Growth Alliance (VEGA), Director of Communications, Washington, DC
2012 - 2014

- Directed organization's rebranding and website redesign.
- Instituted communications policies and processes as the organization's first Director of Communications.
- Led communications Working Group for VEGA's 23 member organizations' staff.
- Led communications efforts for USAID's Farmer-to-Farmer program.
- Led knowledge management (KM) initiative in partnership with The QED Group, LLC.
- Led implementation of new Salesforce database.
- Liaised with outside contractors and staff to manage IT projects.

National Peace Corps Association, Manager of Online Initiatives, Washington, DC 2009 - 2012

- Managed \$1.2 million budget to build online contest platform for collaboration between the African Diaspora, rural farmers, and Peace Corps Volunteers.
- Directed the 12-person team of staff and consultants to brand, design, develop, and publicize the corporate website and social networking platforms.
- Managed three Twitter accounts and two Facebook pages with a total audience of over 40,000, and trained staff and others in the grassroots community on best practices.
- Managed branding and development of other website platforms including a Peace Corps 50th Anniversary microsite.
- Invited to speak about online technologies at the 2012 Secretary of State's Global Diaspora Forum; the Bill & Melinda Gates Foundation; the World Affairs Council; the World Food Prize; and USAID.
- Profiled in the 2010 book *Empowered: Unleash Your Employees, Energize Your Customers, and Transform Your Business* published by Forrester Research.

Van Ness Feldman, P.C., Marketing Coordinator, Washington, DC 2005 - 2009

- Implemented online strategies and supported marketing efforts for 80 attorneys at DC-based energy law firm.
- Managed and trained attorneys on InterAction, the firm's customer relationship management (CRM) system.

Peace Corps, Peace Corps Volunteer, Mali, West Africa, 2002 - 2004

- Honed entrepreneurial and problem-solving abilities while mastering the cultural and technological skills needed to prosper and work in a remote, rural village of 1,000.
- Became proficient in Malinke, the local language.

Marketing Science Institute, Research and Publications Coordinator, Boston, MA 2001 - 2002

- Assisted the Executive Director and Director of Research Operations with management of marketing research program

SKILLS

- Website Content Management Systems: Drupal, WordPress, Wagtail
- Customer Relationship Management: Salesforce, Interaction, Association Anywhere
- Email Marketing: Constant Contact, MailChimp, Campaign Monitor
- Social Networking platforms: Facebook, Twitter, Ning, Google+
- Other: Jira, Confluence, Redmine, Trello, Basecamp, Teamwork, YouTube, Flickr

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.

Please see our proposal for a full list of qualifications to satisfy the contractual requirements. Forum One has designed, developed, and launched hundreds of successful open-source websites for non-profit clients. This includes providing ongoing support for clients such as the Schusterman Foundation, U.S. Environmental Protection Agency, Health Resources & Services Administration, amfAR and many others. Forum One was founded to connect the world and solve problems in ways never before seen. For over twenty years, our team have helped leading non-profits make an impact and extend their influence.

- 2. YEARS IN BUSINESS: Indicate the length of time you have been in business providing these types of goods and services.

Years 21 Months 9

- 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.

Table with 4 columns: CLIENT, LENGTH OF SERVICE, ADDRESS, CONTACT PERSON/PHONE #. Rows include National Home Visiting Resource Center, MATHCOUNTS Foundation, TRG (Prime to USAID contract), Washington State Fruit Commission, and Fairfax County Public Schools.

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

2200 Mount Vernon Ave. Alexandria, VA 22301

1110 Vermont Ave NW, Suite 500 Washington, DC 20005

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: Forum One Preparer Name: John Johnson

Date: 2/27/2018

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 SBSB 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: Web Application Development/Update Services RFP#LBS-1022 Date Form Completed: 11/27/2018

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

Offeror / Proposer:

Forum One Communications Corporation
Firm

2200 Mount Vernon Ave. Alexandria, VA 22301
Address

John Johnson, 703.894.4315
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)
N/A					

(Form shall be submitted with proposal and if awarded, again with submission of each request for payment)

RETURN OF THIS PAGE IS REQUIRED



Request for Proposal

RFP# LBS-1022

Web Application Development/Update Services

10/25/18



REQUEST FOR PROPOSAL
RFP# LBS-1022

Issue Date: 10/25/18
Title: Web Application Work
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 November 29, 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: LeeAnne Beatty Smith, Buyer Senior, Procurement Services, smith2LB@jmu.edu; 540-568-7523; (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 # LBS-1022

TABLE OF CONTENTS

I.	PURPOSE	Page	1
II.	BACKGROUND	Pages	1-3
III.	SMALL, WOMAN-OWNED, AND MINORITY PARTICIPATION	Page	3
IV.	STATEMENT OF NEEDS	Pages	3-4
V.	PROPOSAL PREPARATION AND SUBMISSION	Pages	4-7
VI.	EVALUATION AND AWARD CRITERIA	Pages	7-8
VII.	GENERAL TERMS AND CONDITIONS	Pages	8-14
VIII.	SPECIAL TERMS AND CONDITIONS	Pages	14-20
IX.	METHOD OF PAYMENT	Page	21
X.	PRICING SCHEDULE	Page	21
XI.	ATTACHMENTS	Pages	21-26
	A. Offeror Data Sheet		
	B. SWaM Utilization Plan		
	C. Sample of Standard Contract		
	D. Zone Map		

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 web application work for James Madison University (JMU), an agency of the Commonwealth of Virginia. Initial contract shall be for one (1) year with an option to renew for 4 (four) additional one-year periods.

II. BACKGROUND

James Madison University (JMU) is a comprehensive public institution in Harrisonburg, Virginia with an enrollment of approximately 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>.

The Institute for Innovation in Health and Human Services (IHHS) is part of James Madison University's College of Health and Behavioral Studies and works to connect the greater community with programs and services not offered elsewhere. The Institute focuses on community health through a variety of projects including preventative health, mental health and recovery. The Institute also serves as the home for JMU's Pre-professional Health program.

- A. The Virginia Department of Education Training and Technical Assistance Center (T/TAC) at James Madison University is part of a statewide network of seven regionally located centers that provide professional development and support designed to assist school personnel in addressing accountability and improvement goals for students with disabilities (*ages birth - 22*). For more information about special education programs and services in Virginia, visit the VDOE Web site at www.doe.virginia.gov/special_ed/index.shtml.

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

Participating schools will be provided with tools that will enable them to use self-determined skills as measured through school activity logs and individual student, teacher, and parent pre- and post- test assessment scales. Students with disabilities will increase their participation in IEP meetings as measured through the IEP Participation Continuum Checklist, as well as develop social networks within their communities and engage in positive and appropriate community activities (*recreation/leisure/civic*) as measured through a Quality of Life Assessment Scale.

The *I'm Determined* project has been funded by the Virginia Department of Education since its inception in 2005 with the last couple of year's work having been devoted to accessibility through technology. JMU's T/TAC facilitated the rebuild and redesign of the *I'm Determined* website in 2008 (www.imdetermined.org). This website upgrade has allowed the project to

grow from nine (9) pilot school sites in 2005 to over 70 school divisions in Virginia and over 30 states across the nation using/accessing our materials.

The success of the website led to the idea to develop apps for the three main *I'm Determined* tools (*One-Pager*, *Goal Setting*, & *Good Day Plan*). The targeted users of these apps are teachers, Virginia Exceptional Education Students, and K-12 General Use. The *I'm Determined* Apps include:

IMD3: <https://itunes.apple.com/us/app/imd3/id932867714?mt=8>

The I'm Determined Good Day Plan is a simple tool to empower students, especially individuals with disabilities, and educators. The Good Day Plan allows students and teachers to better communicate with each other while planning out a good day, ultimately allowing students to overcome challenges in the learning environment.

The I'm Determined Goal Setting application is a simple tool to empower students, especially individuals with disabilities, and educators. The goal setting app allows students and teachers to better communicate with each other by identifying the students goals, steps toward planning and execution, while identifying people who can support these efforts along the way.

The I'm Determined OnePager is a simple tool to empower students, especially individuals with disabilities, and educators. The OnePager allows students and teachers to better communicate with each other and to identify areas they can work on together, ultimately allowing them to overcome challenges in the learning environment.

IMD Problem Resolution: <https://itunes.apple.com/us/app/problem-resolution/id924177272?mt=8>

The IMD (I'm Determined) Problem Resolution app is a simple tool designed specifically for resolving student interpersonal concerns. The Problem Resolution app allows students to share their story, and identify steps towards a resolution, and teachers to facilitate mediation and incident management.

- B. IHHS is implementing Vision of You (VOY) as part of “Virginia Personal Responsibility Education Innovative Strategies” to serve youth residing in areas with high teen birth rates that demonstrate elevated risk factors for experiencing or causing a teen pregnancy. This project is funded by the US Department of Health and Human Services Administration for Children and Families- Family and Youth Services Bureau (FYSB). VOY is an interactive, self-paced, online sexuality education program that uses engaging video, animation, interactive components, and gamification principles to provide information, skills, and change behavior. VOY is being evaluated using a random controlled trial with vulnerable high-school aged populations (*e.g. youth in juvenile detention centers, youth attending alternative education, and youth in Community Services Board programs*). The program aims to reduce the frequency of sexual activity, reduce the number of sexual partners, increase contraceptive use among participants, and increase adulthood preparation subject knowledge and skills among participants. Information about the current application and the facilitation manual which details the application components can be found here: <https://www.visionofyouinfo.org/introduction-to-voy/> .

The existing “Vision of You” web-based application has successfully launched and is currently engaging students in the Vision of You program. The existing web-based

application is coded on the client-side using HTML, CSS, and JavaScript with React libraries. PHP is used for server-side functionality and data exchange between client and server. While the current application is functioning, the client-side coding is fragile and unstructured with little to no commentary on functionality, and technical issues limit use, reliability, and capability. Current issues include: many standard web browsers and devices are not supported causing access issues and user support issues, simple content edits are causing fundamental delivery and presentation to break, and the application code base is incapable of supporting and working with a management system functionality.

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

JMU seeks a qualified and experienced firm that can provide web application updates and/or development services on an as-needed basis to the University. Specifically, this company shall have the equipment, processes, personnel, and knowledge to provide web application services for current and future University projects.

Offerors shall provide detailed responses to the following:

- A. Provide an executive summary of your firm including office locations, years in business, personnel information (e.g. number of employees, expertise, resumes) and services offered.
- B. Provide the resume and contact information of a primary point of contact for the University.
- C. Specify any work that your firm subcontracts out and the names of the subcontractors.
- D. Contractors shall not proceed with work under a resulting contract without a University-issued purchase order. Describe the process the University would follow to request a project quote.
- E. Describe your firm's process for determining the time/hours needed for a University project. Specify all information that will be provided on a project quote.
- F. Describe how project timelines will be determined and communicated to JMU client. Describe your firm's process for adhering to timelines.
- G. Describe your firm's customer service model.
- H. Describe your firm's experience in developing applications that are accessible for all levels and types of disabilities, including Section 508 compliance. Provide examples of previous and/or current work demonstrating knowledge around accessibility standards.
- I. Describe the documentation offered for University projects.

- J. Describe the support provided during the implementation of new or updated applications.
- K. Provide examples of completed web application work to include:
 - 1. Previous project(s) related to special education and/or educational services
 - 2. Previous project(s) related to health and human services
 - 3. Previous project(s) completed for higher education.
 - 4. Previous project(s) showing examples of front and back-end sides of application.
- L. Describe your firm's experience and/or capacity for converting an existing web-based application client-side functionality to a new code base.
- M. Describe your firm's experience developing customized back-end management systems.
- N. Describe the plan for maintaining open communication during project work with the relevant university client.
- O. Describe any additional services that your firm can offer to the University. Specify additional costs and/or hourly rates in *Section X, Pricing Schedule* of this solicitation.
- P. Describe your firm's ability to provide training sessions to educators for created applications. Indicate whether this training can be provided in-person and/or via webinar. Specify additional costs in *Section X, Pricing Schedule* of this solicitation.
- Q. Describe your firm's ability to present innovative ideas for application updates/creation. Include details on branding strategy experience.
- R. Describe the escalation process that JMU will follow in the event that problems are discovered with application(s) after its launch. Describe how your firm would resolve problems within application(s) to ensure customer satisfaction (*i.e. code issues, bugs, etc.*). Provide an explanation of any costs that the University would incur in *Section X, Pricing Schedule*.
- S. Describe how your firm would propose to assist the University with service and maintenance of application(s).
- T. Describe the application security features for data.
- U. Describe your approach to test and production environments.
- V. The University occasionally explores opportunities for hosting applications external to the university. Describe hosted and data storage services. Specify additional costs in *Section X, Pricing Schedule*.

V. PROPOSAL PREPARATION AND SUBMISSION

A. GENERAL INSTRUCTIONS

To ensure timely and adequate consideration of your proposal, offerors are to limit all contact, whether verbal or written, pertaining to this RFP to the James Madison

University Procurement Office for the duration of this Proposal process. Failure to do so may jeopardize further consideration of Offeror's proposal.

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 five (5) 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. Responses to Section IV. Statement of Needs of this Request for Proposal.
3. Offeror Data Sheet, included as *Attachment A* to this RFP.
4. 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.
5. 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.
6. 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:

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

Allocation of points for evaluation criteria will be published to the eVA solicitation posting prior to the closing date and time.

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

3. Each prime contractor who wins an award in which provision of a SWAM procurement plan is a payment, evidence and certification of compliance (subject only to insubstantial shortfalls and to shortfalls arising from subcontractor default) with the SWAM procurement plan. Final payment under the contract in question may be withheld until such certification is delivered and, if necessary, confirmed by the agency or institution, or other appropriate penalties may be assessed in lieu of withholding such payment.
 4. The Commonwealth of Virginia encourages contractors and subcontractors to accept electronic and credit card payments.
- K. PRECEDENCE OF TERMS: Paragraphs A through J of these General Terms and Conditions and the Commonwealth of Virginia Purchasing Manual for Institutions of Higher Education and their Vendors, shall apply in all instances. In the event there is a conflict between any of the other General Terms and Conditions and any Special Terms and Conditions in this solicitation, the Special Terms and Conditions shall apply.
- L. QUALIFICATIONS OF OFFERORS: The Commonwealth may make such reasonable investigations as deemed proper and necessary to determine the ability of the offeror to perform the services/furnish the goods and the offeror shall furnish to the Commonwealth all such information and data for this purpose as may be requested. The Commonwealth reserves the right to inspect offeror's physical facilities prior to award to satisfy questions regarding the offeror's capabilities. The Commonwealth further reserves the right to reject any proposal if the evidence submitted by, or investigations of, such offeror fails to satisfy the Commonwealth that such offeror is properly qualified to carry out the obligations of the contract and to provide the services and/or furnish the goods contemplated therein.
- M. TESTING AND INSPECTION: The Commonwealth reserves the right to conduct any test/inspection it may deem advisable to assure goods and services conform to the specifications.
- N. ASSIGNMENT OF CONTRACT: A contract shall not be assignable by the contractor in whole or in part without the written consent of the Commonwealth.
- O. CHANGES TO THE CONTRACT: Changes can be made to the contract in any of the following ways:
1. The parties may agree in writing to modify the scope of the contract. An increase or decrease in the price of the contract resulting from such modification shall be agreed to by the parties as a part of their written agreement to modify the scope of the contract.
 2. The Purchasing Agency may order changes within the general scope of the contract at any time by written notice to the contractor. Changes within the scope of the contract include, but are not limited to, things such as services to be performed, the method of packing or shipment, and the place of delivery or installation. The contractor shall comply with the notice upon receipt. The contractor shall be compensated for any additional costs incurred as the result of such order and shall give the Purchasing Agency a credit for any savings. Said compensation shall be determined by one of the following methods:
 - a. By mutual agreement between the parties in writing; or
 - b. By agreeing upon a unit price or using a unit price set forth in the contract, if the work to be done can be expressed in units, and the contractor accounts for the number of

units of work performed, subject to the Purchasing Agency's right to audit the contractor's records and/or to determine the correct number of units independently; or

- c. By ordering the contractor to proceed with the work and keep a record of all costs incurred and savings realized. A markup for overhead and profit may be allowed if provided by the contract. The same markup shall be used for determining a decrease in price as the result of savings realized. The contractor shall present the Purchasing Agency with all vouchers and records of expenses incurred and savings realized. The Purchasing Agency shall have the right to audit the records of the contractor as it deems necessary to determine costs or savings. Any claim for an adjustment in price under this provision must be asserted by written notice to the Purchasing Agency within thirty (30) days from the date of receipt of the written order from the Purchasing Agency. If the parties fail to agree on an amount of adjustment, the question of an increase or decrease in the contract price or time for performance shall be resolved in accordance with the procedures for resolving disputes provided by the Disputes Clause of this contract or, if there is none, in accordance with the disputes provisions of the Commonwealth of Virginia Purchasing Manual for Institutions of Higher Education and their Vendors. Neither the existence of a claim nor a dispute resolution process, litigation or any other provision of this contract shall excuse the contractor from promptly complying with the changes ordered by the Purchasing Agency or with the performance of the contract generally.

P. DEFAULT: In case of failure to deliver goods or services in accordance with the contract terms and conditions, the Commonwealth, after due oral or written notice, may procure them from other sources and hold the contractor responsible for any resulting additional purchase and administrative costs. This remedy shall be in addition to any other remedies which the Commonwealth may have.

Q. INSURANCE: By signing and submitting a proposal under this solicitation, the offeror certifies that if awarded the contract, it will have the following insurance coverage at the time the contract is awarded. For construction contracts, if any subcontractors are involved, the subcontractor will have workers' compensation insurance in accordance with § 25 of the Rules Governing Procurement – Chapter 2, Exhibit J, Attachment 1, and 65.2-800 et. Seq. of the Code of Virginia (available for review at <http://www.jmu.edu/procurement>) The offeror further certifies that the contractor and any subcontractors will maintain these insurance coverage during the entire term of the contract and that all insurance coverage will be provided by insurance companies authorized to sell insurance in Virginia by the Virginia State Corporation Commission.

MINIMUM INSURANCE COVERAGES AND LIMITS REQUIRED FOR MOST CONTRACTS:

1. Workers' Compensation: Statutory requirements and benefits. Coverage is compulsory for employers of three or more employees, to include the employer. Contractors who fail to notify the Commonwealth of increases in the number of employees that change their workers' compensation requirement under the Code of Virginia during the course of the contract shall be in noncompliance with the contract.
2. Employer's Liability: \$100,000
3. Commercial General Liability: \$1,000,000 per occurrence and \$2,000,000 in the aggregate. Commercial General Liability is to include bodily injury and property damage, personal injury and advertising injury, products and completed operations coverage. The

Commonwealth of Virginia must be named as an additional insured and so endorsed on the policy.

4. Automobile Liability: \$1,000,000 combined single limit. *(Required only if a motor vehicle not owned by the Commonwealth is to be used in the contract. Contractor must assure that the required coverage is maintained by the Contractor (or third party owner of such motor vehicle.)*

R. ANNOUNCEMENT OF AWARD: Upon the award or the announcement of the decision to award a contract over \$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 eprocurement solution by completing the free eVA Vendor Registration. All offerors must register in eVA and pay the Vendor Transaction Fees specified below; failure to register will result in the proposal being rejected. Vendor transaction fees are determined by the date the original purchase order is issued and the current fees are as follows:

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

1. For orders issued July 1, 2014 and after, the Vendor Transaction Fee is:
 - a. Department of Small Business and Supplier Diversity (SBSD) certified Small Businesses: 1% capped at \$500 per order.
 - b. Businesses that are not Department of Small Business and Supplier Diversity (SBSD) certified Small Businesses: 1% capped at \$1,500 per order.
 2. For orders issued prior to July 1, 2014 the vendor transaction fees can be found at www.eVA.virginia.gov.
 3. The specified vendor transaction fee will be invoiced by the Commonwealth of Virginia Department of General Services approximately 60 days after the corresponding purchase order is issued and payable 30 days after the invoice date. Any adjustments (increases/decreases) will be handled through purchase order changes.
- V. AVAILABILITY OF FUNDS: It is understood and agreed between the parties herein that the Commonwealth of Virginia shall be bound hereunder only to the extent of the funds available or which may hereafter become available for the purpose of this agreement.
- W. PRICING CURRENCY: Unless stated otherwise in the solicitation, offerors shall state offered prices in U.S. dollars.
- X. E-VERIFY REQUIREMENT OF ANY CONTRACTOR: Any employer with more than an average of 50 employees for the previous 12 months entering into a contract in excess of \$50,000 with James Madison University to perform work or provide services pursuant to such contract shall register and participate in the E-Verify program to verify information and work authorization of its newly hired employees performing work pursuant to any awarded contract.
- Y. TAXES: Sales to the Commonwealth of Virginia are normally exempt from State sales tax. State sales and use tax certificates of exemption, Form ST-12, will be issued upon request. Deliveries against this contract shall usually be free of Federal excise and transportation taxes. The Commonwealth's excise tax exemption registration number is 54-73-0076K.

VIII. SPECIAL TERMS AND CONDITIONS

- A. AUDIT: The Contractor hereby agrees to retain all books, records, systems, and other documents relative to this contract for five (5) years after final payment, or until audited by the Commonwealth of Virginia, whichever is sooner. The Commonwealth of Virginia, its authorized agents, and/or State auditors shall have full access to and the right to examine any of said materials during said period.
- B. CANCELLATION OF CONTRACT: James Madison University reserves the right to cancel and terminate any resulting contract, in part or in whole, without penalty, upon 60 days written notice to the contractor. In the event the initial contract period is for more than 12 months, the resulting contract may be terminated by either party, without penalty, after the initial 12 months of the contract period upon 60 days written notice to the other party. Any contract cancellation

notice shall not relieve the contractor of the obligation to deliver and/or perform on all outstanding orders issued prior to the effective date of cancellation.

- C. **IDENTIFICATION OF PROPOSAL ENVELOPE:** The signed proposal should be returned in a separate envelope or package, sealed and identified as follows:

From: _____

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

Name of Purchasing Officer:		

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

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

- D. **LATE PROPOSALS:** To be considered for selection, proposals must be received by the issuing office by the designated date and hour. The official time used in the receipt of proposals is that time on the automatic time stamp machine in the issuing office. Proposals received in the issuing office after the date and hour designated are automatically non responsive and will not be considered. The University is not responsible for delays in the delivery of mail by the U.S. Postal Service, private couriers, or the intra university mail system. It is the sole responsibility of the Offeror to ensure that its proposal reaches the issuing office by the designated date and hour.
- E. **UNDERSTANDING OF REQUIREMENTS:** It is the responsibility of each offeror to inquire about and clarify any requirements of this solicitation that is not understood. The University will not be bound by oral explanations as to the meaning of specifications or language contained in this solicitation. Therefore, all inquiries deemed to be substantive in nature must be in writing and submitted to the responsible buyer in the Procurement Services Office. Offerors must ensure that written inquiries reach the buyer at least five (5) days prior to the time set for receipt of offerors proposals. A copy of all queries and the respective response will be provided in the form of an addendum to all offerors who have indicated an interest in responding to this solicitation. Your signature on your Offer certifies that you fully understand all facets of this solicitation. These questions may be sent 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 SBSB-certified small businesses. This shall not exclude SBSB-certified women-owned and minority-owned businesses when they have received SBSB 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 SBSB 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. PRIME CONTRACTOR RESPONSIBILITIES: The contractor shall be responsible for completely supervising and directing the work under this contract and all subcontractors that he may utilize, using his best skill and attention. Subcontractors who perform work under this contract shall be responsible to the prime contractor. The contractor agrees that he is as fully responsible for the acts and omissions of his subcontractors and of persons employed by them as he is for the acts and omissions of his own employees.
- R. SUBCONTRACTS: No portion of the work shall be subcontracted without prior written consent of the purchasing agency. In the event that the contractor desires to subcontract some part of the work specified herein, the contractor shall furnish the purchasing agency the names, qualifications and experience of their proposed subcontractors. The contractor shall, however, remain fully liable and responsible for the work to be done by its subcontractor(s) and shall assure compliance with all requirements of the contract.
- S. WORK ESTIMATES: The contractor shall furnish the agency with a written estimate of the total costs to complete the work required. The estimate must include the labor category(ies), the contractor's hourly rates specified in the contract, and any other charges agreed to in the contract. If the agency determines that the estimated price is not fair and reasonable, the agency has the right to ask the contractor to reevaluate the estimate. At the agency's sole discretion, a purchase order will be issued to the contractor, as the authority to proceed with the work, which will incorporate the contractor's estimate and the terms and conditions of the contract. The contractor shall submit invoices only for completed work.
- T. CONFIDENTIALITY OF PERSONALLY IDENTIFIABLE INFORMATION: The contractor assures that information and data obtained as to personal facts and circumstances related to faculty, staff, students, and affiliates will be collected and held confidential, during and following the term of this agreement, and will not be divulged without the individual's and the agency's written consent and only in accordance with federal law or the Code of Virginia. This shall include FTI, which is a term of art and consists of federal tax returns and return information (*and information derived from it*) that is in contractor/agency possession or control which is covered by the confidentiality protections of the Internal Revenue Code (*IRC*) and subject to the IRC 6103(p)(4) safeguarding requirements including IRS oversight. FTI is categorized as sensitive but unclassified information and may contain personally identifiable information (*PII*). Contractors who utilize, access, or store personally identifiable information as part of the performance of a contract are required to safeguard this information and immediately notify the agency of any breach or suspected breach in the security of such information. Contractors shall allow the agency to both participate in the investigation of incidents and exercise control over decisions regarding external reporting. Contractors and their employees working on this project may be required to sign a confidentiality statement.
- U. NONVISUAL ACCESS TO TECHNOLOGY: All information technology which, pursuant to this Agreement, is purchased or upgraded by or for the use of any State agency or institution or political subdivision of the Commonwealth (the "Technology") shall comply with the following nonvisual access standards from the date of purchase or upgrade until the expiration of this Agreement:
- (i) effective, interactive control and use of the Technology shall be readily achievable by nonvisual means;
 - (ii) the Technology equipped for nonvisual access shall be compatible with information technology used by other individuals with whom any blind or visually impaired user of the Technology interacts;

- (iii) nonvisual access technology shall be integrated into any networks used to share communications among employees, program participants or the public; and
- (iv) the technology for nonvisual access shall have the capability of providing equivalent access by nonvisual means to telecommunications or other interconnected network services used by persons who are not blind or visually impaired.

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

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

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

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

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

- V. **STANDARDS OF CONDUCT**: The work site will be occupied by students and University Personnel during the times work is performed. Contractor and Contractor's personnel shall exercise a particularly high level of discipline, safety and cooperation at all times while on the job site. The Contractor shall be responsible for controlling employee conduct, for assuring that its employees are not boisterous or rude, and assuring that they are not engaging in any destructive or criminal activity. The Contractor is also responsible for ensuring that its employees do not disturb papers on desks, or open desk drawers, cabinets, or briefcases, or use State phones, and the like, except as authorized.
- W. **OWNERSHIP OF INTELLECTUAL PROPERTY**: All copyright and patent rights to all papers, reports, forms, materials, creations, or inventions created or developed in the performance of this contract shall become the sole property of the Commonwealth. On request, the contractor shall promptly provide an acknowledgment or assignment in a tangible form satisfactory to the Commonwealth to evidence the Commonwealth's sole ownership of specifically identified intellectual property created or developed in the performance of the contract.

IX. METHOD OF PAYMENT

The contractor will be paid 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.

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

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 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: _____

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)



November 13, 2018

ADDENDUM NO. ONE

TO ALL OFFERORS:

REFERENCE: Request for Proposal No: **RFP# LBS-1022**
RFP Issue Date: **October 25, 2018**
Commodity: **Web Application Development/Update Services**
RFP Closing On: **November 29, 2018 at 2:00 p.m. (Eastern)**

Please note the clarifications or change(s) made on this proposal:

1. Question: Can you give us any guidance in terms of your target budget for your project?

Answer: The University is not required to provide budget information.

2. Question: It appears there is an incumbent software vendor for the IMD web apps.
a. What factors led to the decision to solicit a replacement vendor?
b. Can you please let us know their rate and historical spend?
c. What was the average monthly hours for application updates and/or development services over the past year?

Answer:
a. The University awarded term contracts in 2014 for application development services to Gromobi, LLC and the Adfero Group. These contracts have a final expiration date of 3/23/19 and we are seeking to replace them.
b. The contracted rates are available within the contract documents found at <http://cipag.jmu.edu/cipag/> . Historical spend can be determined on <https://eva.virginia.gov/index.html> .
c. This is unknown.

3. Question: What documentation is available for the applications describe within the background statement?

Answer: For TTAC: the links to the apps are within the background statement; JMU owns the code.
For VOY: JMU has and owns the code and also has end user documentation (a facilitation manual which can be found at the link in the background section <https://www.visionofyouinfo.org/introduction-to-voy/>

4. Question: What are the project requirements/specifications for the applications described within the background statement?

Answer: The University plans to award a term contract(s) for web application development/update services based on the criteria outlined within the RFP. After award, University representatives will request a quote for a specific project(s)

from the contractor(s) based on contracted rates. A purchase order will be issued by the University to authorize the Contractor to proceed with work.

5. Question: It appears that the IMD3 web app includes responsive design features. Are there plans to replace the dedicated iOS (iPad) app with a mobile app that can utilize this common code base?

Answer: This is unknown at this time.

6. Question: Are there plans to support Android devices for IMD?

Answer: This is unknown at this time.

7. Question: Has the University considered combining the IMD3 and IMD Problem Resolution apps into a single app?

Answer: There are no plans to do this as they are very different from each other, and the IMD3 is already a combination of previous apps.

8. Question: Does the scope of services include the IMD3 web app (currently supported by T/TAC)?

Answer: This is anticipated.

9. Question: Are there plans to create a web version of IMD Problem Resolution?

Answer: There is already a webapp created for the Problem Resolution app, which can be seen here http://www.imdetermined.org/wp-content/apps/problem_resolution/index.html

10. Question: Does the University intend to completely rewrite the VOY web app?

Answer: The existing web-based application client-side functionality needs to be completely converted to a new code base.

11. Question: Is a mobile version of VOY anticipated?

Answer: This is unknown at this time.

12. Question: Does the University have content authors available for possible/required rewrites in other technologies?

Answer: Not for the grant-funded areas described within the RFP background statement.

13. Question: What University resources will be available during the project? In what roles? What will their availability be?

Answer: For the TTAC and VOY projects there are personnel available for ideation, consultation, testing, and to operate as a primary point of contact on the University-side. This would vary if other areas need work.

14. Question: Does the University have a project lead to own, drive, and track each project's progress while monitoring design choices for feasibility and usefulness?

Answer: Yes.

15. Question: Are there any key dates that may impact the development and support services?

Answer: Key dates are dependent on the scope and details of the project.

16. Question: Can you please confirm at this time the full list of websites included in the focus of this RFP? We have the following based on your document:

- a. <https://www.jmu.edu/> including <http://www.jmu.edu/iihhs>
- b. <https://www.ttacjmu.org>
- c. <https://www.imdetermined.org>
- d. <https://www.visionofyouinfo.org/introduction-to-voy/>
- e. Vision of You application

Answer: The University plans to award a term contract(s) for web application development/update services based on the criteria outlined within the RFP. After award, University representatives will request a quote for a specific project(s) from the contractor(s) based on contracted rates. A purchase order will be issued by the University to authorize the Contractor to proceed with work.

- a. No.
- b. This is unknown.
- c. This is anticipated.
- d. No.
- e. This is anticipated.

17. Question: Can you please provide technical details specific to the websites that are included under the scope of this engagement, including platforms, how the sites were built and maintained?

Answer: imdetermined.org and ttac.org were both built using Expression Engine (EE). Currently, I'm Determined is on WordPress and ttac.org will be transitioning to WordPress as well. The only part of imdetermined.org that is not on WordPress is the Youth & Parent summit application, which is still on EE due to unique features that it does.

Vision of You application: The front-end student-side of the website was developed using React and makes API calls to a PHP back-end. No specific PHP framework was utilized for the back-end.

18. Question: Can you please confirm ttacjmu.org is built and maintained using Expression Engine?

Answer: Yes it was build and maintained using Express Engine (EE) but will be moved to WordPress in the near future. The only part that will not be on WordPress is the lending library (which was built and maintained in EE) as we are looking at commercial options as a replacement.

19. Question: Can you please confirm visionofyouinfo.org is built and maintained using Squarespace? Once you are logged in, can you please provide the technical details of that system?

Answer: Yes the visionofyouinfo.org is built and maintained using Squarespace; however, this site is informational for the purpose of explaining the VOY program and application and will not be part of a work project.

The Vision of You application is www.visionofyou.org and the existing code base is

described within the background statement of the RFP. Access to the application testing environment will be provided to the successful contractor(s) in order for them to provide a project quote(s).

20. Question: Is it the intention of JMU to maintain the existing setup for each of these websites, or would you consider a singular system (such as WordPress or Drupal) configured for multisite management?

Answer: For TTAC: See response to #17 above. For VOY: Is open to options.

21. Question: Can you please provide details on your existing hosting environment(s)?

Answer: The VOY application is hosted on a managed AWS instance through Cloudways. The main I'm Determined site is hosted at Liquid Web. Other TTAC work has the hosting handled by the current contractor.

22. Question: In addition to the mobile web app for the *I'm Determined* project are there any other mobile web applications that would be a part of this project?

Answer: This is unknown.

23. Question: How many task orders do you expect to issue and under what frequency?
a. Could you please provide a sample task order for us to review?
b. Historically, what have you seen as LOE for supporting these applications?
c. What has been the process and general timeline for issuing a task order, review of proposals from partners, selection of partner, and execution of work?
d. How many concurrent task orders do you expect to be issued at any given time?
e. Will selected partners receive a task order for ongoing activities such as maintenance and platform updates and / or scoping and requirements gathering?

Answer: This is unknown.
a. We do not have this.
b. This has varied by project.
c. This has varied by project.
d. This is unknown.
e. This is unknown.

24. Question: Is there any budgetary information you can share with us at this time?
a. What historic information can you provide regarding average number of hours a month has been utilized in maintaining and supporting the platforms?
b. What is the average hourly rate you are expecting?
c. What is the average budget anticipated per task order?

Answer: The University is not required to provide budget information.
a. We do not have this information.
b. Offerors should provide their best hourly rate(s) in their proposal to RFP# LBS-1022.
c. This is unknown.

25. Question: Is there an incumbent partner, and if so has the partner been invited to submit a proposal?

Answer: The University awarded term contracts in 2014 for application development services to Gromobi, LLC and the Adfero Group. These contracts have a final expiration date of 3/23/19 and we are seeking to replace them. The RFP was

publicly posted in <https://eva.virginia.gov/index.html> and publicly advertised in a newspaper. Any firm interested in providing a response is invited.

26. Question: How many prospective partners have been invited to submit a proposal?

Answer: The RFP was publicly posted in <https://eva.virginia.gov/index.html> and publicly advertised in a newspaper. Any firm interested in providing a response is invited.

27. Question: What is the weighting in the evaluation criteria specific to *Participation of Small, Women-Owned, & Minority (SWaM) Businesses*?

Answer: As stated in the RFP: Allocation of points for evaluation criteria will be published to the eVA solicitation posting prior to the closing date and time.

28. Question: Can you describe the processes for how the *Vision of You* application data and content is updated? Will the selected partner be responsible for these updates in the future?

Answer: Currently, any updates needed are made internally by our backend developer. It is anticipated that the selected contractor(s) will be responsible for making these updates in the future.

Sincerely,



LeeAnne Beatty Smith, CPPB, VCA, CUPO
Buyer Senior, Contract Purchases
Phone: (540-568-7523)

PROCUREMENT SERVICES
MSC 5720
752 Ott Street
Wine-Price Building
Harrisonburg, VA 22807
540.568.7523 Phone



November 29, 2018

ADDENDUM NO. TWO

TO ALL OFFERORS:

REFERENCE: Request for Proposal No: **RFP# LBS-1022**
RFP Issue Date: **October 25, 2018**
Commodity: **Web Application Development Services**
RFP Closing On: **~~November 29, 2018 at 2:00 p.m. (Eastern)~~**
December 4, 2018 at 2:00 p.m. (Eastern)

Please note the clarifications or change(s) made on this proposal:

The closing date and time has been extended to December 4, 2018 at 2:00 p.m. Eastern.

Sincerely,

LeeAnne Beatty Smith, CPPB, VCA, CUPO
Buyer Senior

PROCUREMENT SERVICES
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