

E-Newsletter and Email Marketing Solution

Request for Proposal

Rev 0

RFP #43813887 REBID

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Scope of Work

- I. Scope of Solicitation**
- II. Instructions to Offerors**
- III. Scope of Work / Specifications**
- IV. Terms and Conditions - Special**
- V. Bidding Schedule**

I. SCOPE OF SOLICITATION

Clemson University’s Public Affairs office seeks a vendor to provide and implement an all-in-one e-newsletter and email marketing solution. The solution must have the interactivity of a website but with analytics of an email marketing solution. Desired characteristics include Social Media integration, recipient customization, list management, multivariate testing, reporting, and dynamic content.

AWARD

Award will be made to one Offeror. Award will be made to the highest ranked, responsive and responsible Offeror whose offer is determined to be the most advantageous to the university. The contract will be based on the initial product license, annual maintenance fee, and professional services for training and implementation.

CONTRACT PERIOD - ESTIMATED

Software Product to include License and Maintenance

Initial Term: 01/14/2013 – 01/13/2014

Maximum Term: 01/14/2013 – 01/13/2015

Dates provided are estimates only. Any resulting contract will begin on the date specified in the notice of award.

The effective date of this contract is the first day of the Maximum Contract Period as specified on the final statement of award. For bids where award statement is not required, the effective date of the contract will be the issue date on the Purchase Order. For continuing contracts the initial term of this agreement is one (1) year from the effective date as stated on the award document. At the end of the initial term, and at the end of each renewal term, this contract shall automatically renew for a period of one year, unless contractor receives notice that the University elects not to renew the contract at least thirty (30) days prior to the date of renewal. Said renewals may be less than, but will not exceed, one (1) additional one year period. Regardless, this contract expires no later than the last date stated on the final statement of award.

Deadline for Receipt of Questions: All questions must be emailed to Tammy Crooks at duncant@clermson.edu prior to 12/02/2013, 12:00 Noon ET.

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II. INSTRUCTIONS TO OFFERORS

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

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

SUBMITTING YOUR PROPOSAL – Regardless of specific requirements below or in this document, Offerors are required to submit their proposal electronically through the Clemson University online bidding system. To do so you must login (registering first) at <https://sciquest.ionwave.net/prod/default.aspx?company=clemson>, and follow specific instructions for this solicitation. Do NOT simply email or mail in proposals based on this scope of work document. You must attach your complete proposal response as two separate .pdf files in the online bidding system - one file as a technical only (i.e. no cost information) and one file as a cost proposal. Submit any additional files if required as redacted proposals. These attachments must address all the specific requirements outlined in Section II, Instructions to Offerors, as well as Section III, Scope of Work/Specifications.

Complete literature must be submitted as an attachment in the Bid Attachment Response in the online bid document. Any deviation from specifications, indicated herein, must be clearly pointed out; otherwise, it will be considered that items offered are in strict compliance with these specifications, and successful bidder will be held responsible. Include Offeror’s name on the cover of any specifications or descriptive literature submitted with offer.

REQUIRED PROPOSAL CONTENT: Qualified Offerors are encouraged to submit a proposal for the e-newsletter and email marketing solution outlined within this solicitation specification. Each proposal must meet the minimum requirements contained within this solicitation to be considered for a contract award.

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

1. Cover Letter

Offeror shall provide a cover letter that contains a commitment to provide the product/services described in this solicitation. The cover letter must include the name and signature of a representative of the Offeror who is authorized to negotiate a contract with the University and should summarize the overall benefits to selecting your company and what your company considers to be the most important factors involved in the selection of an e-newsletter and email marketing solution.

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2. Table of Exceptions

A summary must state whether your proposal does or does not fully comply with the requirements defined in this solicitation and shall provide a detailed list of exceptions to the Scope of Work or other solicitation requirements including all attachments. This list must be in table form and must identify the page, section number, provision and specific exception, non-conformance and/or substitute language proposed. Failure to identify any specific items of non-compliance will result in the University assuming compliance. The University, at its sole discretion, may modify or reject any exception or proposed change, and an exception may also make a proposal non-responsive.

3. Executive Summary

The Executive Summary shall condense and highlight the contents of the solution being proposed by the Offeror in such a way as to provide the Evaluation Committee with a broad understanding of the Offeror's Proposal. Offerors must present their understanding of the problems being addressed by implementing a new system, the objectives and intended results of the project, and the scope of work. Offerors shall summarize how their Proposal meets the requirements of the Request for Proposal, and why they are best qualified to perform the work required herein.

4. Qualifications

A. Corporate Overview

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

1. Offeror Identification and Information

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

2. The Offeror must disclose any and all judgments, pending or expected litigation, or other real or potential financial reversals, which might materially affect the viability or stability of the organization, or state that no such condition is known to exist.

3. Change of Ownership

If any change in ownership or control of the company is anticipated during the twelve (12) months following the proposal due date, the Offeror must describe the circumstances of such

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135 change and indicate when the change will likely occur. Any
136 change of ownership to an awarded vendor(s) will require
137 notification to Clemson.

138 4. Office Location

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

142 5. Contract Documents

143 The Offeror shall provide copies of all contract documents.
144 Contract documents may include, but not be limited to: software
145 license agreements, professional services agreements, master
146 services agreements, maintenance agreements, support and service
147 level agreements, etc.

148 **B. References**

149 The Offeror shall provide a minimum of three (3) references from three
150 separate higher education institutions with contact information including
151 email addresses. Clemson reserves the right to check any reference(s),
152 regardless of the source of the reference information, including but not
153 limited to, those that are identified by the company in the proposal, those
154 indicated through the explicitly specified contacts, those that are identified
155 during the review of the proposal, or those that result from communication
156 with other entities involved with similar projects.

157
158 Information to be requested and evaluated from references may include,
159 but is not limited to, some or all of the following: project description and
160 background, job performed, functional and technical abilities,
161 communication skills and timeliness, cost and schedule estimates and
162 accuracy, problems (poor quality deliverables, contract disputes, work
163 stoppages, etc), overall performance, and whether or not the reference
164 would rehire the firm or individual. Only top scoring Offerors may
165 receive reference checks and negative references may eliminate Offerors
166 from consideration for award.

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168 The Offeror shall provide a summary listing previous projects similar to
169 this Request for Proposal in size, scope and complexity.

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171 **5. Installation/Implementation Plan/Timeline**

172 The successful Offeror, as part of the Cost Proposal price, will be responsible
173 for configuration, and implementation of the proposed product as may be
174 requested by Clemson University. Such assistance shall include telephone or e-
175 mail, if requested by Clemson University. All other work required to complete
176 the implementation must be included in the fixed price cost, this should include
177 a detailed implementation timeline. Offeror must provide detailed information

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178 on the configuration and implementation requirements as well as detailed
179 information on the schedule.

180
181 Provide a detailed implementation plan that includes a timeline with dates of
182 initiation and completion. Include all requirements, if any, for university
183 resources that must be used for each step of the implementation.

184 **6. Insurance**

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

188 189 **7. Maintenance/Support Agreement**

190 Maintenance/Support Agreement must include, but not limited to, any upgrades,
191 updates, enhancements, new releases, etc. to the product released during the
192 term of the contract. Offerors must detail what is contained in their
193 maintenance/support agreement, to include descriptions of service level
194 offerings and licensing considerations.

195 196 **8. Training Plan**

197 The Offeror must develop and submit a Training Plan that supports all
198 requirements of this RFP. The Offeror must supply initial technical training on
199 the proper use of any software solution. The training must be sufficient to
200 enable technical individuals designated by Clemson to fully understand, test,
201 validate, use tools for, and operate and instruct others as to the features,
202 functions, capabilities and maintenance (e.g., trouble identification) of the
203 software so as to perform all functions effectively and without error. The
204 Offeror shall also identify user groups and additional training resources that
205 might be beneficial to Clemson University's implementation.

206 207 **9. Third Party Use**

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

210 211 **10. Documentation of Product**

212 Provide both on-line and printed materials that document the product.

213 214 215 **11. Conversion/Migration/Integration**

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

218 219 **12. Agreements**

220 Include any forms or agreements (i.e. Service Level Agreements) to include
221 performance commitments.

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13. Additional Functionality/Services

Additional enhancements that may benefit the application, i.e. any specifications for future expansion, or for features or capabilities that will likely be needed by Clemson University at some time in the future may be submitted. Products under development to meet these future needs should be referenced with anticipated release dates.

14. Consulting/Development/Customization/Programming Services

A detailed plan for future consulting, development, customization and programming services will be submitted based on fixed hourly rate to include travel, meals, lodging and all expenses as required under South Carolina Travel Regulations and Guidelines. This cost will not be used in evaluation but may be negotiated.

15. Security

A. Must comply with all applicable laws and regulations commonly found in a higher education environment as well as timely implementation of compliance with future changes to laws and regulations. Current laws and regulations include, but are not limited to: FERPA, Clery Act, ADA 508 compliance.

B. Offerors should also include documentation of how Clemson University data is kept secure and confidential.

16. Hardware/Software

The Offeror must specify all software and hardware required for the system to function in the manner described. Be specific if any particular software versions are required. Identify and describe any additional hardware required.

17. Technical Proposal

Provide a technical proposal with a detailed description of how your product/service meets the requirements documented in this section as well as Section III/Scope of Work/Specifications. Offeror's proposed solution must describe and identify all products/services to fulfill the scope of this RFP document which must be identified as Offeror's "base solution". It is the intent of Clemson University to acquire the best base solution possible and for evaluation purposes, it is imperative that Offerors completely and carefully word and convey all of the information requested. Offers should be prepared simply and economically, providing a straightforward, concise description of Offeror's capabilities to satisfy the requirements of the RFP. Emphasis should be on completeness and clarity of content. Offerors must demonstrate a thorough understanding of the project purpose, scope, activities, requirements and responsibilities. Technical Proposal responses must be complete and detailed, must address each section using identical section titles, and must

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268 follow the order and use the numbering scheme contained in the RFP Purpose
269 and Scope of Work. Offerors must discuss their approach and methodology for
270 each of the activities and deliverables in the proposal and identify key dates.
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272 Again, the base solution **must** describe/identify/include all products/services to
273 fulfill the scope of this RFP document. However, there may be additional
274 products/services/enhancements/add-ons that have **not** been requested in the
275 scope of the RFP document but **will be required** for Offeror's product/service
276 to fulfill the scope of the RFP document. If this is the case, Offerors **must**
277 identify/describe/include these additional products/services in their technical
278 proposal as the "base solution". Any additional products/services/
279 enhancements/ add-ons Offeror **requires** in the base solution to fulfill the scope
280 of the RFP **must** also be identified/included in the Offeror's Cost Proposal as
281 the cost of the "base solution". If your offer includes any additional
282 enhancements and/or add-on components or services that is **not required** to
283 fulfill the scope of the RFP, these products/services **must** be identified and
284 described in your Technical Proposal as well as your Cost Proposal documents
285 and labeled in each proposal as Appendix A so that Clemson University can
286 easily and clearly identify what is included in your technical base solution and
287 what is included in your cost base solution. Including a separate appendix for
288 products/services **not** included in the base solution will aide in our evaluation
289 process along with providing a complete understanding of your offer contents.
290 Offers which include either modifications to any of the solicitation's contractual
291 requirements or an Offeror's standard terms and conditions may be deemed non-
292 responsive and not considered for award.
293

18. Cost Proposal

294 The cost of the proposed products/services must be itemized by Offeror in the
295 Cost Proposal, addressing requirements listed throughout the proposal
296 document. Offeror's proposed solution must describe and identify all
297 products/services to fulfill the scope of this RFP document which must be
298 identified as Offeror's "base solution". It is the intent of Clemson University to
299 acquire the best base solution possible and for evaluation purposes, it is
300 imperative that Offerors completely and carefully word and convey all of the
301 information requested. For each requirement, the Offeror's response to the item
302 must be presented, along with which product/service addresses the requirement.
303 At the end of the document in the Cost Proposal, the Offeror must present all
304 products/services identified as necessary to fulfill the requirements of the RFP
305 document and the cost of each must be listed separately as the "base solution".
306 Again, the base solution **must** describe/identify/include all products/services to
307 fulfill the scope of this RFP document. However, there may be additional
308 products/services/enhancements/ add-ons that have **not** been requested in the
309 scope of the RFP document but **will be required** for Offeror's product to fulfill
310 the scope of the RFP document. If this is the case, Offeror **must**
311 identify/describe/include these additional products/services in their Cost
312 Proposal as the "base solution". If your offer includes any additional
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314 enhancements and/or add-on components or services that is **not required** to
315 fulfill the scope of the RFP, these products/services **must** be identified and
316 described in your Cost Proposal and labeled as Appendix A so that Clemson
317 University can easily and clearly identify what is included in your cost base
318 solution. Including a separate appendix for products **not** included in the base
319 solution will aide in our evaluation process along with providing a complete
320 understanding of your offer contents. All costs must be included in the Cost
321 Proposal. Cost Proposal must be separate from the Technical Proposal as stated
322 above in RFP Submittal section. **Do not include cost in Technical Proposal.**
323 **These should be submitted as two separate documents via .PDF**
324 **attachments in the online bidding system. Total cost to fulfill requirements**
325 **specified herein must also be indicated in Bid Line Item Pricing in online**
326 **bidding system.** Your separate cost proposal may go into more detail in terms
327 of cost breakdown, options, etc..., but it must also clearly indicate the cost you
328 enter into the online system. This is the cost that will be used for evaluation
329 purposes and should reflect the cost for the base technical proposal you are
330 offering in response to this solicitation. If there are conflicts in the costs you
331 propose or Clemson cannot clearly determine a total cost for your proposal,
332 your response may be deemed non-responsive.

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335 *Please provide the following in the separate cost proposal:*

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337 *In the submitted proposals please list the initial cost of software services,*
338 *license renewal and/or maintenance, training, support, and one-time cost for*
339 *designing email templates. The software will need to accommodate a*
340 *minimum of 1,000,000 email sends and at least five licenses. Additional*
341 *licenses may be negotiated. Evaluation of cost will be based on 1,000,000*
342 *email sends and at least five licenses; however, Offerors are encouraged to*
343 *include their detailed pricing structure. Offerors cost will be evaluated based*
344 *on the total cost of ownership for the base solution for the potential two-year*
345 *contract period. Please include, if applicable, the hourly rate for future*
346 *consulting services, or needed assistance once installation and training has*
347 *occurred.*

III. SCOPE OF WORK / SPECIFICATIONS

Overview

351
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353 Clemson University's Public Affairs office seeks offers for an all-in-one, web-based e-newsletter
354 and email marketing solution that will provide features necessary to create and disseminate
355 interactive e-newsletters, and run an email campaign, such as message sending, contact entry,
356 contact importing, and reporting. The vendor will be required to provide live in-person or web-
357 based training on the system as well as on-going support and service including system upgrades,
358 fixes, and enhancements.

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361 **Requirements:**

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363 The solution **must** include:

364 **1. Technical**

- 365 a) Ability to access from any operating environment.
- 366 b) Licensing, account set up, prefer to handle DHCP, virtual mail server, and direct
367 attached storage set-up.
- 368 c) One master account and four sub-accounts.
- 369 d) Ability to integrate with an email listserv so that administrator does not have to
370 upload email lists.
- 371 e) Ability for recipients to customize the information that they want (and do not
372 want) to receive, with the ability to make some categories mandatory.
- 373 f) Ability to authenticate to SMTP and POP servers or send directly with an internal
374 server.
- 375 g) Ability for recipient to view email/e-newsletter in a MacOS or Windows
376 environment, or a mobile environment. Please include a list of the mobile
377 environments that you cover.
- 378 h) HTML and plain text editor for creating messages.
- 379 i) Spam checking technology to preview message content for problematic content or
380 formatting.
- 381 j) Test and review module, which enables user to send to a testing group, which can
382 edit, provide feedback and/or approve communication.
- 383 k) IPV6 WARRANTY (MAR 2012): Contractor represents and warrants that the
384 equipment is designed to create or receive, process, and send or forward (as
385 appropriate) IPv6 packets in mixed IPv4/IPv6 environments. IPv6 Capable
386 Products shall be able to interoperate with other IPv6 Capable Products on
387 networks supporting only IPv4, only IPv6, or both IPv4 and IPv6**.

388 **2. Training and support**

- 389 a) Live, individual online or in-person training
- 390 b) Dedicated account manager
- 391 c) Periodic account reviews by dedicated account manager
- 392 d) Unlimited access to vendor resources such as webinars, white papers and
393 workshops.

394 **3. Newsletter**

- 395 a) Ability to create a uniform interactive back-end microsite where content can
396 reside.
- 397 b) Ability to “rate,” “comment” and “like” an article with a method to manage
398 comments.

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- 399 c) Provide custom email and newsletter templates and the ability for user-created
- 400 templates.
- 401 d) Ability to easily share newsletter content with various social networks.
- 402 e) Ability to create and print out a full-text PDF version of the newsletter that is
- 403 formatted in one long publication with photos and no page breaks.
- 404 f) Ability to automatically pull content into newsletter through RSS feed or to enter
- 405 content directly into the tool.
- 406 g) Newsletter should automatically resize images.
- 407 h) Newsletter should contain the capability to stream embedded video through the
- 408 newsletter
- 409 i) Ability to include polls and surveys in the newsletter with instant results.
- 410 j) Ability to provide No “opt out” links in newsletters
- 411 k) Mobile-responsive design

412 **4. Email**

- 413 a) Ability to create and send personalized e-mail lists using data from a customer
- 414 database.
- 415 b) Ability to group and target subscribers based on behaviors, demographic
- 416 information, data source and campaign history.
- 417 c) Ability to target subscribers using both lists and filters.
- 418 d) Provide custom email templates and the ability for user-created templates.
- 419 e) External e-mails: Automatic unsubscribe and bounce-back handling.
- 420 f) Ability to provide opt-out links in external emails with no-opt out links in internal
- 421 emails.
- 422 g) Mobile-responsive design

423 **5. Analytics and reporting**

- 424 a) Pre-made reports as well as custom reports.
- 425 b) Ability to create client sending profiles and separate email campaigns for each
- 426 client/profile.
- 427 c) Ability to personalize communications with an unlimited number of fields.
- 428 d) Access to detailed, real-time reporting and analytics tools.
- 429 e) Access to a comprehensive list management tool to create, upload, download, and
- 430 segment lists.
- 431 f) Ability to collect social network data and use it for better audience and message
- 432 targeting.
- 433 g) Split campaign testing and segmented lists.
- 434 h) Tracking and reporting features including; but not limited to:
- 435
 1. Mobile/desktop device readership breakdown
 - 436 2. Engagement statistics
 - 437 3. Trending reports across all metrics
 - 438 4. Poll/survey reports
 - 439 5. Content popularity reports
 - 440 6. sent and delivered (total and by domain)

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- 441 7. bounce-backs (number and domain, soft and hard, reason for
442 bounce)
443 8. opens (aggregate and unique)
444 9. click-throughs (by specific link and by individual)
445 10. forwards to a friend
446 11. unsubscribes (for external emails)
447 12. geo-location (opens per location)
448 13. complaints (per campaign and from which subscribers)
449 14. aggregate performance data of email marketing campaigns
450 15. side-by-side comparison of campaign activity and response rates
451 16. Benchmark data against other vendor clients

452 IV. TERMS AND CONDITIONS – SPECIAL

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454 Agreement will initially be made between vendor and Clemson University's Public Affairs
455 office; however, additional Clemson University units must be allowed to enter into agreement
456 upon request.

457 EVALUATION FACTORS -- PROPOSALS

458 Offers will be evaluated using only the factors stated below. Evaluation factors are stated in the
459 relative order of importance, with the first factor being the most important. Once evaluation is
460 complete, all responsive Offerors will be ranked from most advantageous to least advantageous.
461

462 Evaluation Criteria:

- 463 1. **Technical Proposal:** The degree, completeness, and suitability of the Offeror's
464 proposed technical solutions to meet or exceed the requirements of this RFP. **(50%)**
465 2. **Cost Proposal:** The total cost of ownership for the base solution for the potential two-year
466 contract period. **(45%)**
467 3. **Offeror's Qualifications:** The Offeror's experience, references and key staff must
468 provide evidence of its depth and breadth of experience, and evidence of successful past
469 performance with projects of this similar size and scope. **(5%)**
470

471 DEMONSTRATION

472 The apparent successful vendor may be requested to demonstrate its product so that Clemson
473 University may verify the claims made in the vendor's proposal. This is a pass/fail evaluation.
474 Due to that fact that demonstrations are not part of the initial evaluation, it is critical that
475 proposals contain detailed and complete responses. Do not rely on providing a response as part
476 of a demonstration.
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V. BIDDING SCHEDULE/COST PROPOSAL

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

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

487

<i>Cost Component</i>	<i>Cost</i>		
	<i>Year 1</i>	<i>Year 2</i>	<i>Total</i>
Cost of Software (to accommodate a minimum of 1,000,000 email sends and at least five licenses.)			
Software Maintenance & Support (years 1-2 – to accommodate a minimum of 1,000,000 email sends and at least five licenses.)			
Hardware costs (if applicable)			
Training Costs			
Implementation/Setup Costs			
Data Conversion & Integration			
Include any one-time costs for designing email templates			
Documentation & Training Materials			
Costs for Additional Professional Services			
Any Other Costs not defined above			
TOTAL			

488

489 *Total for years 1-2 above will be used for evaluation purposes and considered to be the “Base*
490 *Solution” costs. This Base Solution Cost (years 1-2) must be transferred to Total Price in*
491 *Online Bidding system as well.*

492

493 **Offeror should clearly list optional items and any other charges associated with any item in**
494 **their cost proposal. A detailed breakdown that your total, fixed price is based on must be**

