

**Request for Quotations – Personal Services**

**SWIS Suite 5.0 Software Localization**

**Quotations due by**: April 18, 2013, 5:00pm

**Contact:** Dr. Joseph Boland

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**Department:** Educational & Community Supports, College of Education

**Address:** 1235 University of Oregon, Eugene, OR 97403-1235

**Submittal Instructions:** Enter the requested information onthe Request for Quotations (RFQ) form, print and sign it. Prepare your complete response, including the RFQ form and any additional documents. Submit the complete response via email, facsimile or US mail to the department contact noted above.

**General Information:** The State Board of Higher Education acting by and through the University of Oregon on behalf of the College of Education’s department of Educational and Community Supports (“University”) is issuing this RFQ for the procurement of personal services as described in the Scope of Work section below. Use this form to submit your signed quotation pursuant to the submittal instructions by the date and time shown above. Additional documents may be included as part of the response, provide all documents in Word format. If you do not use this form your quote may be deemed non-responsive. **If you do not sign this Request for Quotations form or submit it to University by the due date and time, your quote will be deemed non-responsive and will not be considered for award**.

By providing a quote in response to this RFQ, Contractor agrees to the terms and conditions contained in this RFQ and further agrees to the Personal Services Contract Standard Contract Provisions found at <http://pcs.uoregon.edu/content/forms>. Any contract resulting from this RFQ will be subject to the Personal Services Contract Standard Contract Provisions. Quotations submitted that contain any exceptions or modification to the terms and conditions contained in this RFQ or the Personal Services Contract Standard Contract Provisions, may be deemed non-responsive by University in its sole discretion. If modifications to the Personal Services Contract Standard Contract Provisions are requested the sections and specific modifications must be provided. Separate terms to replace the Personal Services Contract Standard Contract Provisions in its entirety will not be considered.

Quotes submitted in response to this RFQ will be retained by the University for the required retention period and made a part of the file or record that will be open to public inspection. If a response contains any information that is considered a “trade secret” under ORS 192.501(2), mark each page containing such information with the following legend: “TRADE SECRET”.  The Oregon public records law exempts from disclosure only bona fide trade secrets, and the exemption from disclosure applies “unless the public interest requires disclosure in the particular instance.”  Non-disclosure of documents or any portion thereof or information contained therein may depend on official or judicial determinations made pursuant to law. An entire response to this RFQ marked as “trade secret” is unacceptable, and all parts of such quote will be deemed available for public disclosure.

**Insurance Requirements:** If checked, the specified insurance is required for any contract resulting from this RFQ. See Attachment D included in this RFQ, Personal Services Contract Insurance Requirements.

**Additional Terms and Conditions**: If checked, this quotation is subject to additional University terms and conditions attached and titled:

**SWIS Suite 5.0 Software Localization**

**Scope of Work:**

## Overview

**Educational and Community Supports is an autonomous research institute within the College of Education of the University of Oregon.** University’s innovative behavioral research is the foundation for applications and training programs that help schools create and maintain healthy learning environments and help children through early diagnosis of cognitive and behavioral problems. University is a leader in providing scientifically validated systems that schools can use to promote the self-development and maximize the learning potential of students.

University’s products include a suite of web applications that enable schools to implement and sustain positive behavioral interventions and supports (PBIS) programs. This suite includes SWIS (school-wide information system), CICO (check-in check-out), ISIS (individual student intervention system), and SAMI (SWIS account management interface). These are collectively referred to as the SWIS Suite. Full-featured demonstrations of SWIS, CICO, and ISIS are available at <http://www.swis.org/>. Click on Login and follow instructions for using the demo account. The SWIS Suite is currently used by over 8,000 schools in the United States as well as schools in Canada, Australia, New Zealand, Denmark, Norway, and several other countries.

University wants to create localized editions of the SWIS Suite 5.0 for Denmark and Norway. The purpose of this RFQ is to solicit quotes from contractors to provide localization services for Denmark and Norway as further set forth below. Additionally, University may, in its sole discretion, contract with successful responder for additional localization services, including localization services for other countries.

To prepare for the localization for Denmark and Norway, University is internationalizing the SWIS Suite. Internationalization is outside the scope of this project because University is performing this work internally.

## Localization Requirements

University requests quotes on localizing approximately 12,800 words within the four SWIS Suite applications (SWIS, CICO, ISIS, and SAMI) for Denmark and Norway. For each country only one localized edition will be required. The Danish edition should use [standard Danish](http://en.wikipedia.org/wiki/Danish_dialects#Dialects), the Norwegian edition the Bokmål dialect. University’s SWIS Suite development team is using Java properties files as its internationalization repository for localized text (see [here](http://en.wikipedia.org/wiki/.properties) and [here](http://www.alchemysoftware.ie/livedocs/cat9/translating_and_engineering/localizing_software_applications/working_with_java_files.htm) for more information).

### Localization Process

University’s requirements for the localization process are described in the following items. University prefers that translation service providers be [EN 15038](http://en.wikipedia.org/wiki/EN_15038) certified.

In order to meet the localization target release date of August 22, 2013, University requires that at least 90% of the localization content be in its final form by June 28, 2013. Contractor must conduct two major translation iterations, the first by June 28, 2013, the second by July 25, 2013, and final revisions by August 15, 2013.

Contractor will provide the following:

1. **One-time Startup Events**
   1. **Development team training** – two events**:**
      1. Localization overview (target audience- everyone engaged in project, about 15 people selected by University)
      2. Technical review of internationalization (for about 8 people selected by University).
   2. **Content review and glossary creation** – glossary to be created as an index for terms which are specific to University’s focus on behavior management in educational settings.
2. **Localization Cycle**
   1. **Translate** – To be done using professional translators and localization software to ensure quality and consistency.
   2. **Proofread** – Text review by professional editors.
   3. **Linguistic testing** – Review of translated content in context in a staging site by a professional native speaker to find linguistic, cosmetic and functional issues.
      1. This will be based upon a comprehensive specification of the browsers, browser versions, and platforms to perform testing on.
   4. **Submit for approval –** Stakeholders in Denmark and Norway will review and approve.
3. **One time Pre-release Events**
   1. Final regression testing cycle to make sure all localization issues are identified and resolved.

University will be responsible for the following:

**1. Translator training** – Translator training on the applications being localized, including access to development sites for applications.

* 1. **Glossary approval** – Approval of glossary by University staff at national PBIS centers in Denmark and Norway before moving forward to the translation stage.
  2. **Localized user interface review** – Reviewing appearance of application, user interfaces with content localized for Denmark and Norway.
  3. **Review by stakeholders in Denmark and Norway** – Review of translated content in context in a staging site by University staff at national PBIS centers in Denmark and Norway.

### Timeline

University is in the latter stages of developing a new version of the SWIS Suite, version 5. University expects to have a final English language release of version 5.0 by August 19, 2013. Localized editions are scheduled for release by August 22, 2013. The internal, feature complete release scheduled for July 19, 2013 will be the point at which all text, user interface elements, and code is expected to be locked (with the exception of bug fixes). There will be earlier internal releases in April, May and June. The June 28, 2013 internal release is expected to be 90% feature complete.

Given this release schedule our required timeline is as specified below.

* By May 15, 2013
  + Development team training in localization and internationalization
  + Deliverables:
    - Project kickoff meeting
      * Introduction of key personnel
      * Project plan review and refinement
      * Project communications and process management established
    - Two training events
* By June 28, 2013
  + Translator training in SWIS Suite applications by University
  + Content review and glossary creation
  + Glossary translation and approval by University and staff at national PBIS centers in Denmark and Norway
  + Translation phase 1
  + Deliverables
    - Translator training by University
    - Glossary approved by University and staff at national PBIS centers in Denmark and Norway
    - Phase 1 translations in agreed format
* By July 25, 2013
  + University freezes all code, UI, and English text by July 19(bug fixes excepted)
  + Translation phase 2
  + Proofread
  + Linguistic testing (if performed)
  + Deliverables
    - Phase 2 translation in agreed format
    - Certification of all translated content by Contractor proofreaders and linguistic testers
    - Review of all translated content by staff at national PBIS centers in Denmark and Norway
* By August 15, 2013
  + Translation revisions based on review by staff at national PBIS centers in Denmark and Norway
  + Final review of translated content and localized user interfaces by staff at national PBIS centers in Denmark and Norway and University
* By August 22, 2013
  + Release of localized editions by August 22

The school year in Denmark and Norway begins in mid-August. In light of this, release of localized editions should occur as early in August as feasible; August 22 is the latest acceptable date.

### Out of Scope

The following items are out of scope for this project:

* **Documents**. Document translation is being handled by national PBIS center staff in Denmark and Norway.
* **Database**. Database text requiring localization rarely changes. Although University is in the process of database internationalization, for this project University will handle database text localization at the application level via Java properties entries mapped to database tables and rows.
* **Online help**. Currently national centers in Denmark and Norway provide support to users in their respective countries. University may, in a future project, internationalize our SharePoint Portal and create localized online support.

### Document Requirements

All glossaries, translation memory data, and other assets specific to this project are the property of University and must be provided to University in a usable format, defined by University.

## Term and Termination

The initial term of the contract awarded under this RFQ will be for 6 months, with the option, at University’s sole discretion, to extend the contract seven additional 6 month terms, for a total contract term not to exceed four years. The duration and scope of extensions for additional localization services will be mutually agreed to in writing through an amendment to the original contract, resulting from this informal competitive process.

**Qualifications:**

* 4+ years’ experience offering localization services in multiple languages.
* Prefer current [EN 15038](http://en.wikipedia.org/wiki/EN_15038) certification.
* Project manager available throughout project on a business day schedule similar to University schedule (Pacific Time).
* Ability to work closely with stakeholders in Denmark and Norway and to respect their translation preferences.
* Provision of online tools for issue tracking and process management.
* Ability to use Skype, Go-to-meeting, or similar platforms for video meetings and instant messaging.

**Submittals:**

* Business name, address, telephone number and email.
* Business description, including size, number of employees, scope and range of services offered, years in existence, and state of financial health.
* Qualifications to perform the project, including a firm resume.
* A budget with a total price, itemized to the extent feasible.
* Resources available to perform the project, including identification of localization software and other technologies to be used for the project.
* Names, titles, and qualifications of the key personnel who will be assigned to this project, including subcontractors. Include concise business biographies or resumes of the key personnel who will be doing the work described in the quotation. This information must include their areas of expertise, and their experience with projects of similar scope and nature.
* If goods or services will be obtained from a subcontractor in order to fulfill the work set forth in the quotation, list the additional subcontractors, if known. If the identity of the specific subcontractors is not known at the time of quote submission, indicate that a subcontractor is anticipated to be named, and identify the specific service or good that will be subcontracted.
* A list of three clients including contact information for whom similar projects have been completed that can provide reference for the quoting firm.
* A full description of how Contractor would approach this project and fully address all deliverables identified in Scope of Work.

**Contractor’s Proposed Statement of Work (SOW) Details**

**To streamline the quote and contracting review process, fill in the SOW details below.**

**Project Name:** SWIS Suite 5.0 Software Localization

**Contractor Full Legal Name:**

**Contract Term:**

**Proposed Start Date:**

**Proposed End Date:**

**Price Quote for Services:** Fixed Fee:      Variable Fee – Define Structure (ie. Rate per hour or per deliverable):

**Maximum Not to Exceed: $**

**Deliverables:** Contractor will provide to University the following deliverables:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **No.** | **Description of Deliverables/Tasks/Milestones** | **Responsible Party** | **Due Date or Estimated Duration** | **Fee/Rate** |
| 1. |  |  |  |  |
| 2. |  |  |  |  |
| 3. |  |  |  |  |
| 4. |  |  |  |  |
| 5. |  |  |  |  |
| 6. |  |  |  |  |
| 7. |  |  |  |  |
| 8. |  |  |  |  |
| 9. |  |  |  |  |
| 10. |  |  |  |  |

**Additional Expenses:**

**SWIS Suite 5.0 Software Localization**

**Quote for Requested Scope of Work to be Completed by Contractor**

1. **Check all items applicable to this Request for Quotation:**

Response/Informal Proposal included with submittal includes the following:

X Completed Contractor's Proposed Statement of Work (SOW) Details form

[INSERT TYPE OF SUBMITTAL, IE. REFERENCES, QUALIFICATIONS]

[INSERT TYPE OF SUBMITTAL, IE. REFERENCES, QUALIFICATIONS]

Contractor Full Legal Name:

Address:       Email:

Phone:       Fax:

1. **Please indicate your Minority Women or Emerging Small Business (MWESB) Status:**

Women Owned  Self Report State Certified #

Minority Owned  Self Report State Certified #

Emerging Small Business  Self Report  State Certified #

1. **Contractor agrees to furnish the above according to University’s terms, conditions, and specifications.**
2. **Representations and Warranties.**

By submitting this quote in response to this RFQ, Contractor represents and warrants that (1) prices quoted shall be firm for three months; (2) Contractor has the power and authority to enter into and perform the contract awarded as a result of this RFQ; (3) The individual signing for Contractor is authorized to execute this quote on behalf of Contractor; (4) Contractor is an independent contractor and not an employee, partner, or agent of University; and (5) Contractor’s name, as it appears in this quote, is Contractor’s legal name, as it will appear in the Contractor’s W-9, and if Contractor is an entity rather than an individual that the entity named in this quote is validly existing and in good standing.

Signature:

Print Name:

Date:

No Quote. Date Contacted:      Reason:

**ATTACHMENT D**

**PERSONAL SERVICES CONTRACT INSURANCE REQUIREMENTS**

**(Only complete when insurance is required)**

**During the term of this Contract, Contractor will maintain in full force at Contractor’s own expense the insurance indicated below and fulfill the following requirements:**

**1.** **General Liability Insurance  Required by University  Not Required by University**

Contractor will obtain comprehensive general liability insurance with a broad form CGL endorsement or broad form commercial general liability insurance, with a minimum combined single limit of not less than  $1,000,000 for each occurrence and $2,000,000 aggregate or  $2,000,000 for each occurrence and $5,000,000 aggregate covering bodily injury and property damage, and will include personal and advertising injury liability, products liability, and contractual liability coverage for the indemnity provided under this Contract. It will provide that University and officers and employees are additional insureds but only with respect to the Contractor's services to be provided under this Contract(*See* Paragraph #4 of this Attachment).

**2.** **Commercial Auto Liability Insurance:  Required by University**  **Not Required by University**

Commercial automobile liability insurance with a minimum combined single limit of $1,000,000 for each accident and $2,000,000 aggregate for bodily injury and property damage, including coverage for owned, hired and non-owned vehicles, as applicable.

**3.** **Professional Liability Insurance: Required by University**  **Not Required by University**

Examples to consider: attorney, physician, dentist, counselor, architects, etc. Professional Liability insurance with a combined single limit, or the equivalent, of not less than  $1,000,000 per occurrence and $2,000,000 aggregate or  $2,000,000 per occurrence and $5,000,000 aggregate. This is to cover damages caused by error, omission, or negligent acts related to the professional services to be provided under this Contract. If this insurance is arranged on a “claims made” basis, “tail” coverage will be required at the completion of this Contract for a duration of 24 months. Only a certificate is required. **If in the presence of minors:  Required by University  Not required by University**

In addition to the above professional liability insurance requirements, above, Contractor’s professional liability insurance policy will contain provisions for coverage of allegations of corporal punishment, sexual abuse, and molestation.

**4. Insurance; Certificates of Insurance and Endorsements.**

Contractor will obtain insurance policies issued by an insurance company authorized to do business in the State of Oregon with a minimum financial rating of an AM Best rating of A- or higher. Contractor’s liability insurance, except for professional liability insurance, will be arranged on an “occurrence” basis. The Contractor will be financially responsible for all pertinent deductibles, self-insured retentions and/or self-insurance.

Upon request by University, Contractor must provide to University a Certificate of Insurance from the insuring company evidencing insurance coverage required by this Contract.  The “Description of Operations” must include (using the following exact language) the “**State Board of Higher Education acting by and through the University of Oregon, their officers and employees”** as additional insured. The certificate will provide that the insurance company will give a 30-days’ written notice to University if the insurance is cancelled or materially changed.  
  
Upon request by University, Contractor will provide to University an endorsement from the insuring company, naming (using the following exact language) the “**State Board of Higher Education acting by and through the University of Oregon, their officers and employees”** as additional insured. If requested, complete copies of insurance policies will be provided to University.

**5. Notice of cancellation or change.** Contractor will not cancel, materially change, reduce limits, or fail to renew the insurance coverage(s) without 30-days' written notice from the Contractor or insurer(s) to University, Contract Manager at the following address: 720 E. 13th Avenue, Suite 302, Eugene, OR 97401.