# ADDENDUM #1

DATE: April 23, 2020

TO: All Prospective Bidders

FROM: Dennis Sienna, Purchasing Agent II

RE: **RFP# DS012120 Classroom Scheduling Software**

All respondents are hereby advised of the following amendments to the Request for Proposal documents which are hereby made an integral part of the bid documents for the subject contract, prepared by the University of Connecticut Procurement Services Department.

Proposals submitted shall be deemed to include contract document information as shown in Addendum No. 1. Respondents shall be required to acknowledge receipt of this addendum in their proposal response. Failure to acknowledge receipt of this addendum by the respondent may result in the rejection of their proposal response.

**BIDDER NOTE:** This addendum must be completed, signed and submitted with your proposal response to be considered for award. If you have already submitted a proposal, please complete the addendum and submit same ***via*** ***email***, clearly marked with the bid number, response date, and return address. This will be accepted as part of your proposal response, PROVIDING IT IS RECEIVED BY THE PURCHASING DEPARTMENT BY THE TIME AND DATE SPECIFIED WITHIN IN THE RFP.

**Bid Due has been extended as follows: Thursday, May 14th, 2020 at 2:00PM ET*(All submissions shall be via email).***

**Changes, deletions and clarifications to the RFP document are as follows:**

1. **Appendix A - 'Questions' tab** - there are some sections within this tab that have no questions included (i.e. Client Composition, Implementation, etc.). Is there no action needed on our end here.

No action required

1. **Appendix A - 'Functional' tab** - Looking to get some clarity around the following questions:
   1. '*The online portal should be able to automatically validate data against non-SIS institutional data sources'* - Is this referring to an integration with additional tools, i.e. degree audit.

This refers to the requirement that the solution must be able to integrate with other University systems. For instance, if a department is attempting to add an instructor, the solution should be able to leverage the person's records from HR/payroll and the identity management systems to validate that they are assigning the correct instructor.

* 1. *'The solution must support institutional dynamic/flexible dating policies'* - Is this referring to term dates? or administrative dates/timelines? Any context around the types of dates would be extremely beneficial.

This refers to the ability of the solution to accommodate a schedule of classes that uses a flexible design where start dates, end dates and durations differ from the traditional academic term/semester.

1. Is the Vendor-Hosted Questionnaire required for SaaS? If so, would you accept a full HECVAT in lieu of the questionnaire?

Yes, a security questionnaire is required for a SaaS solution. Our IT Security team reviews these and the HECVAT is acceptable.

1. I was inquiring if the University would consider an on premise solution.

So long as the solution is compliant with our policies, we are willing to consider either a cloud-based or on premise solution.

1. Is the classroom scheduling, classroom scheduling optimization and exam scheduling being done centrally at the main campus located in Storrs or done by each of the regional campuses (located in Avery Point in Groton, Stamford, Waterbury, Hartford, UConn and the UConn School of Law?  If it is being done regionally, how many individuals per site are doing the scheduling.

Classroom scheduling, classroom scheduling optimization and exam scheduling are performed by Registrar staff members at each individual campus. The number of individuals performing academic scheduling tasks at each campus ranges between one and four.

1. Are the assignment of rooms done centrally by the main campus in Storrs or done regionally be each campus.

Classroom scheduling, classroom scheduling optimization and exam scheduling are performed by Registrar staff members at each individual campus.

1. Does each campus have its own instance of Oracle Campus solutions or is it just one instance located at the main campus in Storrs.

The University has a single instance of Oracle Campus Solutions.

1. Is Oracle Campus solutions installed on premise at the University?

Yes, the University’s instance of Oracle Campus Solutions is on premise.

1. If a vendor is unable to meet all of the required questions will they automatically be disqualified.

Vendors will be evaluated based on a scoring matrix that reflects all required components. If a proposal lacks a required functionality then its scoring will be reduced accordingly.

1. In reference to Joint Venture: will the University consider multiple solutions.

Yes, the University would consider multiple solutions provided that said solutions meet the University's needs, including all customer and technical support requirements.

1. After extensive market research, we don’t believe there is a single solution delivering all of the requested functionality to customers today. Would the University consider roadmap or features planned for production in their decision?

The University would prefer a solution with developed and implemented features but is willing to consider solutions with features that are in the vendor’s product development plan. Vendors will be evaluated based on a scoring matrix that reflects all required components. If a proposal lacks a required functionality then its scoring will be reduced accordingly.

1. How many institutions must have the desired functionality in production?

The desired functionality must support a single institution with multiple campuses and locations.

1. Considering that questions will be answered on the 23rd, will the University consider extending the submission deadline?

Given the unprecedented circumstances created by the COVID-19 virus the Registrar’s Office is willing to extend the deadline. New Proposal Due date stated in clarification.

1. Which specific SIS data tables need to be updated?

The solution must be able to update all of the following tables and any other tables related thereto that play a role in classroom scheduling.

Class Association Table

Class Attribute Table

Class Component Table

Class Exam Table

Class Instructor Table

Class Meeting Table

Class Notes Table

Class Permissions

Class Reserve Capacity

Class Reserve Group

Class Table

Combined Sections Tables

Facility Table

Instructor/Advisor Table

1. The solution should be able to receive data from multiple systems of record. – Can you give names of the systems to which you would like to pull information?

Student Administration System – Oracle Campus Solutions

Human Resources/Payroll – Oracle PeopleSoft

Identity Management System – SailPoint, Delimited File, and/or LDAP

Facilities Management System – AIM

Office 365

Other University Scheduling Systems – To be Determined

1. The solution must automatically flag mismatching information between combined sections and allow administrators to choose whether to remove remaining sections when a combined section is removed. – Can you provide an example of this use case?

Scheduling combined classes requires a lot of back and forth communication between the academic departments and the scheduling office to establish and verify the days, times, capacities, instructors and other scheduling information. In our current solution this an entirely manual process. We would like the new solution to identify the inconsistencies between sections of combined classes as they are entered into the data collection form and initiate a workflow that facilitates the resolution of the inconsistencies between the departments without requiring administrative intervention.

1. The Non-collusion affidavit requires a notary. With social distancing and the office closed, this is very challenging. Can we send this with DocuSign tracking on it in lieu of an in person notary.

Yes

1. Can you clarify section 7.16.3? Payment terms shall be 2% 15 days, net 45 unless otherwise noted in the bidder’s proposal. Are you referring to a 2% increase?

The University’s payment terms, if the University makes payment within 15 days of being invoiced a 2% discount off invoice will be applied. If payment is not rendered within that period payments will be made at Net 45, no discount applied.

1. We could not link out to this form SEEC Form 10 Acknowledgement of Receipt can you send this to us electronically or fix the link on your website.

Type in the provided web address.

<https://portal.ct.gov/seec>

1. Will you accept Bio’s in lieu of resumes and CV’s? outlined in 5.4.4.6.

Yes

1. Could certain information pertaining to our company roadmap remain confidential in the submission of this RFP.

Information vendors deem confidential need to be clearly indicated in submission.

1. Can all submissions be electronic during COVID-19.

Yes, only electronic bids are going to be accepted.

1. On the F*unctional Requirements* tab of *Appendix A – Technical Proposal Response Matrix*

Row 19 is looking for a solution that performs mass updates for any field based on configurable criteria.

* 1. Other than mass updating rooms in a batch, are there current fields you all regularly update in a batch?

Yes, we employ a web automation tool to update class meetings, instructors, enrollment control data, class notes and class associations. Additionally, we have a number of custom processes in Campus Solutions to update class reserve capacities.

* 1. Have there been fields that you all are updating in mass due to COVID-19. Some of our clients have already requested updates to start/end dates of meeting patterns, and the instruction mode field. If so, have there been any issues doing this directly in Campus Solutions.

To this point we have not made any mass updates to class scheduling data due to COVID-19.

1. Row 26 requires support for institutional dynamic/flexible dating policies. We assume that you mean UCONN leverages the dynamic dating capabilities in Campus Solutions, to which we have these questions:

The University does not currently leverage dynamic dating however we are actively researching the functionality for a select number of courses. We want to ensure that the scheduling solution can accommodate flexible dating should we decide to move forward.

* 1. What “Rule/s” do you use for dynamic dating? Point Between Class Start-End, Percentage of Class Meetings, etc.
  2. Is this only for the summer or also for the academic year?
  3. Do you have a single session you use to note classes that should be dynamically dated, or are there multiple sessions that get dynamically dated?
  4. Do you apply dynamic dating rules on Course Catalog in Campus Solutions? If so, would you say it’s the majority of courses, or just a handful.

1. Row 29 says “the solution should allow the institution to add and configure custom fields.”
   1. What fields outside of the delivered Campus Solution fields are used to record scheduling data?

The requirement in row 29 relates to the collection of scheduling data from the University community.

There may be situations where the scheduling offices needs to collect data points from the academic departments that will facilitate the scheduling of courses, the scheduling of exams and/or assignment of classroom spaces that do not correspond to fields in Campus Solutions. Examples of these include but are not limited to faculty ADA requirements, technological requirements and other classroom features.

* 1. Are they view only or editable fields for the scheduler?

Some custom fields may be editable, others may be view only.

1. The RFP indicates a preference for a single vendor. To our knowledge, no single vendor currently has every technical requirement in production at an institution.  This being the case and assuming significant experience providing stable and fully featured solutions would be of value, would UConn be willing to consider a solution that consists of integrated software from two vendors who have an established history of working together to meet the needs of joint clients.

The Registrar’s Office would be willing to consider a solution that consists of integrated solution from two vendors.

1. Is the classroom scheduling, classroom scheduling optimization and exam scheduling being done centrally at the main campus located in Storrs or done by each of the regional campuses (located in Avery Point in Groton, Stamford, Waterbury, Hartford, UConn and the UConn School of Law. If it is being done regionally, how many individuals per site are doing the scheduling.

REPEAT OF QUESTION 5: Classroom scheduling, classroom scheduling optimization and exam scheduling are performed by Registrar staff members at each individual campus. The number of individuals performing academic scheduling tasks at each campus ranges between one and four.

1. Are the assignment of rooms done centrally by the main campus in Storrs or done regionally be each campus.

REPEAT OF QUESTION 6: Classroom scheduling, classroom scheduling optimization and exam scheduling are performed by Registrar staff members at each individual campus.

1. Does each campus have its own instance of Oracle Campus solutions or is it just one instance located at the main campus in Storrs.

REPEAT OF QUESTION 7: The University has a single instance of Oracle Campus Solutions.

1. Information management (Academic Planning): Are we looking to track student progress through the lifecycle sufficient to communicate through the full student life cycle (registered, enrolled etc.) from prospects through graduation in a single solution.

No, it is not our intension to have this system track student progress.

1. Are we focused on Outbound Communication Management (Academic Planning) i.e. ability to inform students of course offerings (upcoming courses).

The ability to manage academic planning communications would potentially be useful but it is not our focus.

1. Do you require a Self-Service functionality that will allow potential students to login and check status of their course/program application and payment made?

No, we do not require this functionality.

1. Does college require Admission process for students applying for programs that they apply through Self Service application?

No, we do not require this functionality.

1. Does college require automated email notifications sent to registered students for course enrollment and schedule details?

The University would prefer the solution to have the ability to notify students, faculty and/or staff in the event that a schedule change is made.

1. Is there a need for Students to enroll, cancel update payments, and initiate refunds through Self Service application?

No, we do not require this functionality.

1. Do you require administrators, bursars to have the ability to manage student records, enrollments and payments thru application?

No, we do not require this functionality.

1. Do you need the application to integrate with PeopleSoft Campus Solutions for import/export data requirements?

Yes, the solution must integrate with PeopleSoft Campus Solutions.

1. Do you need student functionality to be available on mobile devices?

We would prefer that all functionality be able to be used on different devices and varying screen sizes.

1. Is there a requirement for Financial Aid to be integrated with student enrolment functionality?

No, we do not require this functionality.

1. Do you require external organizations to be available and visible in student enrollment functionality for third party payments?

No, we do not require this functionality.

1. Do you need to integrate the proposed solution with legacy cloud/other systems?

Yes, the solution will need to integrate with other University systems.

1. Do you only need to implement non-credit courses (online/classroom sessions) or would you like to implement full time admissions.

The implementation will be for all University courses.

1. Are you looking for seamless admission process from events to enrollment? In other words, are you looking to implement customer experience as well?

No, we are not looking for a seamless admission process from events to enrollment however, the solution will need functionality that allows members of the university community to submit scheduling requests.

1. Do you have any middleware in place towards integrating multiple applications, if yes, what is the middleware currently in place.

No, we do not have any middleware in place towards integrating multiple applications.

1. What is the roadmap for your existing system?

We do not have a roadmap for our existing classroom scheduling system.

1. What are the types of users and the count of users directly involved in using the system.

In our current solution we have the following 10 types of users:

System Administrators

Academic Administrators

Event Administrators

Academic Schedulers

Event Schedulers

Exam Administrators

Exam Schedulers

Custom User Types *(created for users whose access is limited to a particular building and/or set of rooms)*

View Only

Guest

There are approximately 200 active user accounts in our current solution. Please note that viewing the calendar does not require a user ID so the number of people accessing system is likely higher.

1. Is there any SSO in place, if it’s so, who is the vendor.

Yes, the University has CAS and Shibboleth single sign-on in place.

1. Is student engagement part of the scope (student mailing, SMS, and all other CRM app activities right from student prospect, student lead, and student service management)?

No, student engagement is not part of the scope.

1. Do you have any student CRM system in place? If yes, what is the name of the system? Are there any plans to replace the existing system with the new system? If not, do you have plans to integrate it (CRM) with the proposed system?

The University employs multiple student CRM systems. The division of Enrollment Planning and Management uses Technolutions Slate. There are no plans to replace the existing system and we do not plan to integrate the scheduling solution with the existing CRM.

1. Is student self-service portal a part of your scope.

No, a student self-service portal is not part of our scope.

1. Do you have any payment gateway which is integrated with your existing student system? If yes, who is the vendor?

Yes, the University currently uses TouchNet.

1. Is there any reporting module currently in place? If yes, what is the name of the reporting app? Is a new reporting module in scope? What are the reporting requirements?

The current scheduling solution employs Crystal Reports 2008. The proposed solution must have a reporting component. The reporting component must allow for the creation and maintenance of reports on all scheduling data. Functional users with little to no technical reporting skills need to be able to easy run, manipulate and export reporting data.

1. Can you provide us with existing system architecture?

Our current scheduling system is a cloud-based SaaS. The scheduling software interfaces with the SAS using a site-to-site VPN tunnel.

1. Are you already using any cloud-based solution? If yes, can you kindly provide us with the names of tech/platform stack?

Yes, our current scheduling system, Astra Scheduling, is cloud-based SaaS.

1. Is there any document repository currently being used. If yes, what is the system used and the roadmap of current document repository system?
   1. Is integration of document repository with the proposed solution part of the scope?

The University’s document repository is not part of the scope of this solution.

1. Assuming there would be an integration of the proposed solution with your existing solution, would you be providing techno functional resource(s) to work with us in performing technical tasks and integrations?

The University will have functional and technical resources available to work with the vendor in performing technical tasks and integrations.

1. What is the operating model for this Program: Completely Onsite or Onsite/Offshore.

So long as the solution is compliant with our policies, we are willing to consider either a cloud-based or on premise solution.

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Name of Bidder Date

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Address

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