University of Maine System
Concurrent Enrollment Program - RFP# 2018-67
ADDENDUM #01

CLARIFICATION

QUESTIONS

1. The proposal seems to have been based on the product description for one specific solution. As a result, responses from other vendors will likely differ in some respects but include additional features and benefits not included in the requirements. To what extent will you attach value to additional features not directly listed in the proposal but that provide enhanced utility of the solution?

    ANSWER: RFP Appendix C, Exhibit 1, Table 4 provides for additional components pricing and it is important that additional pricing aspects are captured here so the solution pricing is not over stated. With regard to attaching a value to additional features the team will not evaluate features offered above what is requested.

2. The proposal lists specific technical approaches employed by one vendor to achieve certain functional goals. To what extent will you evaluate proposals based on the ability of the solution to achieve functional goals regardless of the exact technical method employed?

    ANSWER: The evaluation team takes a consensus approach in the evaluation, refer to Section 2.1

3. The RFP includes cost as the most heavily weighted evaluation criteria. A vendor utilizing development and support resources who are not full-time, salaried employees of the vendor lacks a reliable, dedicated infrastructure but can offer extremely aggressive pricing due to the absence of a fixed cost structure. Do you require a minimum level of full-time vendor staffing? Will you require respondents to disclose whether resources assigned to the project are also employed by an entity other than the vendor?

    ANSWER: Please refer to RFP Appendix E, Rider A, Business and Performance Reviews and Employees for guidance on these questions, as well as, Appendix G and H questions which speak to use of sub-contractors, staffing and expertise.

4. The RFP requests a quote for 4,800 students, or approximately 12,500 registrations per year assuming an average of 2.5 registrations per student. Without an automated interface to the student system, these registrations must be manually processed. The proposal requires the ability to interface with Peoplesoft only "in the long term". To what extend do you consider it desirable that the respondent solution provides the immediate ability to interface with Peoplesoft and can provide a reference college of comparable size for this integration capability?

    ANSWER:
    The immediate ability to interface with Peoplesoft at each of the campuses is highly desirable.

5. Do you intend to require respondents to demonstrate that all key program features are being used in production at existing, referenceable customers/colleges?

   ANSWER:
   This is not necessary. The proposal will be evaluated based on features presented by the vendor. References will be evaluated as one component of the review process.

6. APPENDIX H-2, Line 4: Requirement to customize access points for various types of users. Does this mean only the ability to vary which screen a user sees when logging in, or should the solution notify each user by email when they're required to complete a step and include a unique link to the specific actions that are required for that user? Do you consider the ability to customize email notifications to include links to specific required actions and to show only required actions on a user-by-user basis be desirable? Should the solution include robust management of roles and permissions, be able to assign actions to users based on roles, and restrict users from performing actions not assigned to their role?

   ANSWER:
   The solution should notify user when required to complete a step with link to specific actions. This feature would be highly desirable. The solution should manage roles and permissions and actions as described above.

7. APPENDIX H-2, Line 8: The proposal requires customizable "widgets" which is the marketing terminology of one specific vendor. What functional purpose does the university hope to achieve with widgets? Can you provide examples of widget functionality? We have a library of over 150 customizable "steps" that are used to build customer-specific workflows for registration and instructor management on our platform. Does that sound comparable?

   ANSWER:
   Yes, that definition describes the functionality we are looking for.

8. APPENDIX H-2, Line 12: The proposal requires that the solution provide instructor on-boarding and lists specific steps that comprise that process. Are the following capabilities required or, if not required, desirable?

   a. Provide a list of concurrent enrollment courses and ask the instructor to choose which course(s) they want to teach (since qualification decisions often depend on the course the instructor will teach?) then dynamically configure/customize the instructor review based on the course selections

      ANSWER:
      This feature is desirable.

b. Guide the instructor through each of the on-boarding steps, enforce submission of required documents (for example, a transcript, copy of license, resume), and require that all steps are completed before submitting the instructor to the University to be reviewed

   ANSWER:
   This feature is required.

c. Automatically notify appropriate reviewers when an instructor has submitted their credential information and provide a direct link to the materials to be reviewed

   ANSWER:
   This feature is required.

d. Enable multiple possible credential review paths (for example, provide a different review process by department or require approval from additional reviewers depending on the instructors' qualifications)

   ANSWER:
   This feature is desirable.

e. Automatically execute the correct review path based on responses from the instructor or initial reviewer

   ANSWER:
   This feature is desirable.

f. Automatically notify each participant when an action is required and provide a direct link to the specific action each participant needs to complete

   ANSWER:
   This feature is required.

9. APPENDIX H-2, Line 14: Planning and tracking for site and classroom visits
   a. Should the solution provide the ability to set a schedule for site/classroom visits (for example by-annually on or before May 31) and automatically notify the University each time a site visit is due based on that schedule?
      ANSWER:
      Yes.

   b. Should the solution also provide the ability to track other required activities with regard to instructors currently teaching for the college, automatically notify personnel when other required activites are due, and prompt each user to complete the required activity?

ANSWER:
Yes.

c. Should the solution provide the ability to batch-initiate required action for all active instructors with a single click (versus requiring that actions required for all instructors be initiated one instructor at a time), notify each instructor including a customized link allowing them to complete the required action, and track completion of each action on an instructor-by-instructor basis? (For example, require instructors to upload their current syllabus, poll instructors about their intention to teach the following semester, etc.)
ANSWER:
Yes.

10. APPENDIX H-2, Line 16: Solution provides degree planning and monitoring progress towards career pathways
   a. Degree planning is very broad and potentially complex solution area. Are you able to provide more specific requirements? For example:
   ANSWER:

   i. Does the solution need to ingest academic plan data, course catalogs and enrollment requisites from the SIS? Or are you expecting the solution to maintain a separate, independent version of each module in the vendor solution?
   ANSWER:
   These would be separate, independent modules specific to Early College programs offered by some campuses.

   ii. Does the solution need to replicate and synch with the academic plan management, course catalog and enrollment requisite management modules in the SIS to ensure accurate and timely progress assessment to the student?
   ANSWER:
   No, this is not necessary.

   iii. Does the solution need to be capable of supporting multi-institution (UMS member institutions as example) pathways and planning assessments?
   ANSWER:
   Yes, in the long term we are hoping to have multi-institution pathways.

   iv. Most modern degree planning products leverage course schedules to facilitate "what-if" planning scenarios including change of program and changing institution. Are you requiring the vendor solution to ingest and synch with course schedules from all seven University institutions to support "what-if" planning scenarios?
   ANSWER:
   No, this is not required.

11. APPENDIX H-2, Line 18: Robust intuitive course search functionality\
    a. Should the solution filter courses displayed to each student based on their profile information so that students see only courses that are relevant to them? (For example, filtering courses offered at the high school to show only courses that are being offered at the student's high school in the current term).
       ANSWER:
       Yes. The solution should filter by courses offered by their high school or offered by relevant partner institution (online or in-person courses).

    b. The proposal references concurrent enrollment but also requires course sorting by course location which implies online or on-campus courses. Would the capability to provide a consistent registration process for all high school students regardless of whether they take courses at their high school, online, or at the college campus, versus requiring the same student to use different processes depending on course location be desirable?
       ANSWER:
       This would be desirable. Our plan is to have a uniform application used across programs and institutions in UMS.

    c. Does the solution need to be able to search across all courses from all UMS institutions from a single student login (regardless of their home campus)? Or does UMS expect the student log in to each institutions "home page" to search for courses from that institution?
       ANSWER:
       The solution must be able to search across courses from UMS institutions. Some courses will be site specific (e.g. dual/concurrent) enrollment courses offered through partnership with a specific university only at a specific high school. Other courses such as online courses offered by some institutions are available to students state-wide.

12. APPENDIX H-2, Line 19: End-to-end course registration process
    a. Do you require that the solution be able to dynamically adjust the registration process based on the student profile, course selection, etc.? Examples:
       i. Dynamically assess whether the student's high school pays for courses and collect payment only for students at high schools which require that students pay for courses
          ANSWER:
          Yes.

       ii. Prompt the high school to provide grades or transcripts only when this information is required to complete the registration
          ANSWER:
          Yes.

       iii. Initiate a different registration process for tech centers or other course venues
          ANSWER:
          Yes.

        iv.   Require an immunization form only if the student is registering for a course at the College campus
              ANSWER:
              Yes.

b. Do you require the ability to support a variety of course locations such as technical centers, regional centers, courses offered at one high school to students from several nearby high schools, etc. Would the ability to adjust the registration process for these additional course locations, for example by including personnel at the additional locations to see the registration, approve the student, etc. be desirable?
     ANSWER:
     Yes.

c. Do you require a single registration process that will be adopted by all UMS institutions or will each institution require their own registration process that reflects their unique requirements?
     ANSWER:
     There will be a single registration process. However, some courses may have specific prerequisites that will need to be met. The variability will be at the course level, not necessarily at the institution level.

d. Does the solution need to support drop/withdraw workflows, wait listing workflows and course/section capacity management?
     ANSWER:
     Yes.

13. APPENDIX H-2, Line 22: The proposal cites prerequisite tracking and grade tracking as requirements. These\ functions are normally managed within the core system of record (Peoplesoft). If this data is duplicated in the concurrent enrollment system, the University would have to update both systems for any changes and ensure that data remained synchronized between systems at all times. Data integration with Peoplesoft would eliminate the need for the concurrent enrollment solution to duplicate functionality of the core system of record. Would the ability to immediately integrate with Peoplesoft and eliminate this duplication be desirable?
ANSWER:
Yes, this would be highly desirable.

14. APPENDIX H-2, Line 24: Do you require the ability to maintain and automatically apply different payment policies and fees depending on the high school district, course location, type of instructor or and type of course?
ANSWER:
Yes.

15. APPENDIX H-2, Line 35 references status tracking for workflows (a series of steps to be performed by predetermined participants). Workflows can be either static (all steps exist at inception of the workflow, there are no dependencies between steps, the workflow cannot adjust depending on the responses) or dynamic (workflow steps are launched only if required conditions are met, the workflow adjusts based on responses, participants are notified only when they have active workflow steps, etc.). Status tracking implies a dynamic versus a static workflow. Does the University require that the solution be capable of launching workflow steps only upon completion of previous required steps, incorporating conditional logic, and adjusting each workflow 'on the fly' to comply with University policy as relevant for that workflow?
    For example, many colleges have several possible approval processes depending on the course and/or the initial assessment of the instructors qualifications. A dynamic workflow can route each instructor through the correct process, incorporating as many logical branches as needed to ensure the instructor is assessed consistent with University and departmental policies. Do you require dynamic workflows or consider dynamic workflows to be desirable over static workflow?
    ANSWER:
    Dynamic workflows are highly desirable.

16. APPENDIX H-2, Line 40: Do you require that the respondent have full-time, dedicated employees and a dedicated technical support staff to monitor and respond to tickets?
    ANSWER: Please refer to RFP Appendix E, Rider A, Business and Performance Reviews and Employees for guidance on these questions, as well as, Appendix G and H questions which speak to use of sub-contractors, staffing and expertise.