

**REQUEST FOR PROPOSAL # 2024-039**  
**Student Registration Solution**  
**RESPONSE ADDENDUM #1**  
**December 19, 2023**

**CLARIFICATION**

**RFP Submission Due Date is modified to January 29, 2024 on or before 11:59 pm EST**

**Vendor Presentations are moved to February 8<sup>th</sup> and 9<sup>th</sup>. 1 ½ hour presentation blocks starting at 10:00 am EST each day**

**QUESTIONS**

**Q1:** In order to do a complete analysis and provide you with a high-quality response, and because of the holiday season coming up and the unavailability of our technical team, would it be possible for the University to push back the submittal date by at least 3 weeks, making the new due date January 29th.

**A1: OLLI is amenable to having the due date be January 29.**

**Q2:** Please confirm this RFP is for the OLLI at USM only with the option for other universities and programs to opt-in to the resulting contract.

**A2: OLLI is the primary focus of the RFP and resulting initial user for the registration system. The resulting Master Agreement will provide the other campuses / departments' option to use the solution if it is in their best interest throughout the term of the Master Agreement.**

**Q3:** Is the pricing we are supposed to provide exclusively for OLLI?

**A3:Yes**

**Q4:** On average, how many annual registrations does the OLLI process?

**A4: Pre-pandemic, around 6700 registrations annually and post around 5700. We expect those numbers to continue to grow.**

**Q5:** Will the professional development program at USM use the existing solution OR should the response to the RFP ALSO include solutions for the professional development program at USM?

**A5: OLLI is the primary focus of the RFP and resulting initial user for the registration system. The resulting Master Agreement will provide the other campuses / departments' option to use the solution if it is in their best interest throughout the term of the Master Agreement.**

**Q6:** Please list the roles of professionals at USM who need to be included in training sessions. For example: 1 Director, 2 program managers, 1 IT professional, etc.?

**A6: 1 director, 1 program coordinator, 1 administrative assistant, 2 professionals from finance, and any IT professionals specified by USM/UMS.**

**Q7: Does USM desire any in-person training?**

**A7: In person training is preferred, but negotiable. In the cost response make sure to denote in-person training and remote training as different options.**

**Q8: If professional development is included, please list the number of staff within professional development, the number of courses offered annually, and the approximate number of annual registrations processed by professional development.**

**A8: PDP is currently not part of the RFP. OLLI is the primary focus of the RFP and resulting initial user for the registration system. The resulting Master Agreement will provide the other campuses / departments' option to use the solution if it is in their best interest throughout the term of the Master Agreement.**

**Q9: Please list how many users are logging in at peak times and please list typical dates / and time of day of peak times. Please describe any scenarios USM wants to avoid and prevent, related to peak times.**

**A9: Highest usage is the first day of fall session registration at about 1,000 logins. We want to avoid system performance issues and any effect on data retention on those busy days. We prefer to control the timing of when registrations open (rather than an automatic midnight opening).**

**Q10: Please describe any scenarios you want to avoid with a TouchNet integration. Please provide at least 1 report your institution requires that is related to TouchNet and the system.**

**A10:**

Unit	Actuals	Line Description (Full Name)	Amount	Department (col1)	Account	Class	Fund	Program	OperUnit	Order Ref	Transaction Date
UMS06	ACTUALS		25	6711000	13107		0			FB45A619	6/10/2023
UMS06	ACTUALS		-25	6817004	45351		50	69806		FB45A619	6/10/2023
UMS06	ACTUALS		-25	6711000	13107		0			FB45A619	6/10/2023
UMS06	ACTUALS		25	6013100	16009	66	0			FB45A619	6/10/2023

**Q11: Please describe what USM considers to be an expedited implementation. Please explain why USM requests an expedited implementation.**

**A11: OLLI's current registration contract is over in June, so we need to be live by June 2024.**

**Q12: Does the OLLI use Salesforce? If not, please list the programs that use Salesforce at USM.**

**A12: OLLI does not currently use Salesforce. If the solution requires Salesforce additional discussions will occur with internal IT staff and salesforce post submission.**

**Q13: Does USM want respondents to include Salesforce integration as part of the pricing? If yes, please describe the flow of data with Salesforce and the new system.**

[A13: The potential use of Salesforce by OLLI will occur at some point in the future but is not a current need.](#)

[If the solution requires Salesforce additional discussions will occur with internal IT staff and salesforce post submission.](#)

**Q14: What is USM's Student Information System? Do all universities in the state have the same SIS? If not, please list.**

[A14: USM uses PeopleSoft Campus Solutions, but OLLI's registration system does not connect with or use the SIS system.](#)

**Q15: What is USM's finance ERP system?**

[A15: PeopleSoft Financials](#)

**Q16: The RFP mentions Single Sign On. Please describe use case scenarios for SSO. For example, which systems and which users would be a desired fit for SSO.**

[A16: The use of SSO would only be for the OLLI Staff, not for students. For the few people who would be needed, it is \*not\* necessary and managing user accounts by the OLLI Admin is fine. Using SSO would only be useful if easy, no cost, and would allow easier user account termination.](#)

**Q17: Please provide 3 sample reports regularly used by OLLI**

[A17: Yes, see attached examples](#)

**Q18: What type of program registrations would the system be required to manage (please define or provide information about the type of programs and metrics required)?**

[A18: Membership, Courses, events, travel/day trips, and Special interest Group registrations.](#)

**Q19: What type of evaluations would UM be completing for each of the courses?**

[A19: A simple survey between 5 and 15 questions shared primarily with staff, who may choose to share with the instructors.](#)

**Q20: Other than the membership requirement, what are other types of pre-requisite requirements are required for courses or programs?**

[A20: Age \(over 50\).](#)

**Q21: What was the revenue for the University last year? (including credit card revenue volume and merchant statement)**

[A21: We are not able to address this question as part of the RFP process. The focus of the RFP is OLLI at this time.](#)

**Q22: Who is your payment processor and are you willing to change to a different provider?**

**A22: USM uses TouchNet; alternatives are not currently being discussed. There are additional approvals required to use solutions other than TouchNet.**

**Q23: Who do you use as your financial provider?**

**A23: Bank of America**

**Q24: Who is the University currently using?**

**Q24: Entrinsik is currently being used by OLLI**

**Q25: What data will the University be migrating to the new system?**

**A25: OLLI needs to migrate all contacts, their demographics, class/order history, and all previous programs/courses since 2017.**

**Q26: Is the plan to have all 6 universities using the same system (with a single database) OR for each university to have its own separate database (thus, 6 databases)?**

**A26: OLLI is the primary focus of the RFP and resulting initial user for the registration system. The resulting Master Agreement will provide the other campuses / departments' option to use the solution if it is in their best interest throughout the term of the Master Agreement.**

**Q27: What are total annual enrollments (distinct) across all 6 universities/10 Campuses for all non-degree professional development and OLLI courses/programs?**

**A27: OLLI Annual enrollments: Pre-pandemic, around 6700 registrations annually and post around 5700. We expect those numbers to continue to grow.**

**OLLI is the primary focus of the RFP and resulting initial user for the registration system. The resulting Master Agreement will provide the other campuses / departments' option to use the solution if it is in their best interest throughout the term of the Master Agreement.**

**Q28: Has budget already been allocated for this initiative? If not, when will budget be determined?**

**A28: Yes but it is dependent on the proposed solutions cost**

**Q29: When do you hope to be 'live' with a new system?**

**A29: June 30, 2024.**

**Q30: When do you plan on executing an agreement for the purchase of a new system?**

**A30: Yes if a solution is awarded.**

**Q31: What LMS do the 6 universities/10 campuses use? Is it the same for all of them?**

**A31: Brightspace**

**Q32: Do all UMS universities use Touchnet as the payment processor for online transactions?**

**A32: Yes**

**Q33: Does the UMS plan to share their chosen Non-Degree Registration System across all 6 universities/10 campuses?**

**A33: OLLI is the primary focus of the RFP and resulting initial user for the registration system. The resulting Master Agreement will provide the other campuses / departments' option to use the solution if it is in their best interest throughout the term of the Master Agreement.**

**Q34: Is the intent of this RFP to exclude non-degree program registrations outside of Professional Development & OLLI?**

**A34: OLLI is the primary focus of the RFP and resulting initial user for the registration system. The resulting Master Agreement will provide the other campuses / departments' option to use the solution if it is in their best interest throughout the term of the Master Agreement.**

**Q35: Will each UMS university be making their own purchase decision or should we assume the results of the RFP will be a single decision for the system?**

**A35: OLLI is the primary focus of the RFP and resulting initial user for the registration system. The resulting Master Agreement will provide the other campuses / departments' option to use the solution if it is in their best interest throughout the term of the Master Agreement.**

**Q36: To understand a fully implemented solution, please provide the system approach for purchase and implementation. Will there be a single implementation project for the system or is there an expectation that there will be 6 separate implementations?**

**A36: OLLI is the primary focus of the RFP and resulting initial user for the registration system. The resulting Master Agreement will provide the other campuses / departments' option to use the solution if it is in their best interest throughout the term of the Master Agreement.**

**Q37: Revenue is a good indicator of size. What is the annual revenue for each of the intended Professional Development and OLLI programs who "must be afforded the use of the system"?**

**A37: What we can provide is the registrations figures - Pre-pandemic, around 6700 registrations annually and post around 5700. We expect those numbers to continue to grow.**

**Q38: Will there be a single budget to fund the purchase or a separate budget per USM university?**

**A38: OLLI is the primary focus of the RFP and resulting initial user for the registration system. The resulting Master Agreement will provide the other campuses / departments' option to use the solution if it is in their best interest throughout the term of the Master Agreement.**

First Name	Last Name	Email	Phone	Cell Phone	Street Address	City	St	Zip	Course Title	Instructor	Created Time
									REMOTE - India as Portrayed	Sutherland	9:56 AM
										Mayberry	
I removed all the personal the data but this was all populated.									REMOTE - India as Portrayed	Sutherland	12:53 AM
										Mayberry	
									REMOTE - India as Portrayed	Sutherland	7:21 AM
										Mayberry	
									REMOTE - India as Portrayed	Sutherland	6:33 AM
										Mayberry	
									REMOTE - India as Portrayed	Sutherland	1:02 PM
										Mayberry	
									REMOTE - India as Portrayed	Sutherland	7:49 AM
										Mayberry	
									REMOTE - India as Portrayed	Sutherland	6:41 AM
										Mayberry	
									REMOTE - India as Portrayed	Sutherland	12:15 AM
										Mayberry	
									REMOTE - India as Portrayed	Sutherland	4:20 AM
										Mayberry	
									REMOTE - India as Portrayed	Sutherland	12:14 AM
										Mayberry	
									REMOTE - India as Portrayed	Sutherland	3:39 PM
										Mayberry	
									REMOTE - India as Portrayed	Sutherland	3:51 PM
										Mayberry	
									REMOTE - India as Portrayed	Sutherland	12:07 AM
										Mayberry	



### Payment Type Summary

Totals: (4 items)	Count	Payment Amount
CKP	4	150.00
<b>OVERALL Totals:</b>	<b>4</b>	<b>150.00</b>





CKP

Date	Order	First Name	Last Name	Payment Type	Session Id	Payment Amount	Pay Ref Enrole	batchnumber
Dec 13, 2023	6034E7F1	Gina	Tangney	CKP	OPW24_C_R_BLKHIST	50.00	1021	01*PP20436_USD_CKP_6034E7F1
Dec 13, 2023	6034EBD8	Gina	Tangney	CKP	OPW24DONATE:OPSU20DONATE1	50.00	1021	01*PP20436_USD_CKP_6034EBD8
Dec 13, 2023	6034E7F2	Gina	Tangney	CKP	OPW24DONATE	0.00	1021	01*PP20436_USD_CKP_6034E7F2
Dec 13, 2023	6034E7F0	Gina	Tangney	CKP	OPW24_C_R_ANTISEM2	50.00	1021	01*PP20436_USD_CKP_6034E7F0
<b>Totals: CKP(4 items)</b>						150.00		



Id	Course Title	Start Date	End Date	Start Time	End Time	Catalog Times	Location	Last Name	First Name	Total Count	Available Count	Waitlist Count
OPW24_C_R_1972	REMOTE - 1972-1984: The Dozen Years That Radically Changed Maine	1/10/24	2/14/24	9:30 AM	11:30 AM	9:30-11:30am	Zoom	Garson	Sandra	25	5	0
OPW24_C_R_ANTISEM2	REMOTE - Antisemitism, White Supremacy and the Clear and Present Danger to American Democracy	1/9/24	2/13/24	12:45 PM	2:45 PM	12:45-2:45pm	Zoom	Goldfarb	Matthew	37	8	0
OPW24_C_R_BEBRIDGEII	REMOTE - Beginner Bridge Session II	1/9/24	2/13/24	12:45 PM	2:45 PM	12:45-2:45pm	Zoom	Bouwens Day	Don Karen	11	1	0
OPW24_C_R_BLKHIST	REMOTE - Black History of Maine	1/10/24	2/14/24	12:45 PM	2:45 PM	12:45-2:45pm	Zoom	Greene	Bob	18	12	0
OPW24_C_R_CHEMCANDLE	REMOTE - Chemistry by Candlelight	1/10/24	2/14/24	12:45 PM	2:45 PM	12:45-2:45pm	Zoom	Rhodes	Gale	19	5	0
OPW24_C_R_ECONPOL	REMOTE - Contemporary Economic Policy Issues	1/9/24	2/13/24	12:45 PM	2:45 PM	12:45-2:45pm	Zoom	Haveman Wogloom	Jon Geoffrey	14	16	0
OPW24_C_R_GROWTH	REMOTE - Cultivating a Growth Mindset	1/11/24	2/15/24	12:45 PM	2:45 PM	12:45-2:45pm	Zoom	Center	Carol	6	6	0
OPW24_C_R_JUNG2	REMOTE - Decoding Jung's Metaphysics - Part 2	1/11/24	2/15/24	9:30 AM	11:30 AM	9:30-11:30am	Zoom	Kercel	Stephen	1	19	0
OPW24_C_R_LIFESTORIES	REMOTE - Explore Life Stories Through Writing	1/11/24	2/15/24	12:45 PM	2:45 PM	12:45-2:45pm	Zoom	Chadburne	Joan	4	4	0
OPW24_C_R_SSCONT6	REMOTE - Exploring Short Stories	1/8/24	2/12/24	12:45 PM	2:45 PM	12:45-2:45pm	Zoom	Cass	Anne	24	0	6
OPW24_C_R_FIFTIES	REMOTE - Fifties: A Surprisingly Dynamic Decade	1/10/24	2/14/24	12:45 PM	2:45 PM	12:45-2:45pm	Zoom	Benedict	Buck	15	0	11
OPW24_WS_R_ENNIO	REMOTE - Film Music of Ennio Morricone	1/19/24	1/19/24	9:30 AM	11:30 AM	9:30-11:30am	Zoom	Marzagalli	DeWayne	10	10	0
OPW24_C_R_TONYWIN	REMOTE - Golden Age of Broadway: Tony Award Winners of the '50s (Musicals)	1/11/24	2/29/24	9:30 AM	11:00 AM	9:30-11am	Zoom	Masure	Lorraine	22	8	0
OPW24_C_R_FACES	REMOTE - Great Faces Great Places. How the Rest of the World Lives	1/9/24	2/13/24	12:45 PM	2:45 PM	12:45-2:45pm	Zoom	Suitor	David	29	6	0
OPW24_WS_R_AUTBIO	REMOTE - Guided Autobiography	1/12/24	2/2/24	10:30 AM	12:30 PM	10:30-12:30pm	Zoom	Murphy	Katie	8	0	1
OPW24_C_R_HAWAII	REMOTE - History of Hawaii and the Music of the Islands	1/9/24	2/13/24	9:30 AM	11:30 AM	9:30-11:30am	Zoom	Foster	Terry	11	5	0
OPW24_WS_R_WESTP2	REMOTE - History of Western Movies - Part 2 (the 50s)	1/19/24	1/19/24	12:00 PM	3:30 PM	12-3:30pm	Zoom	Marzagalli	DeWayne	11	9	0
OPW24_C_R_INDIANW	REMOTE - India as Portrayed by Indian Women's Fiction Writing	1/11/24	2/15/24	12:45 PM	2:45 PM	12:45-2:45pm	Zoom	Sutherland and Mayberry	Kathleen Betsy	12	18	0
<b>Totals: (39 items)</b>										478		

Id	Course Title	Start Date	End Date	Start Time	End Time	Catalog Times	Location	Last Name	First Name	Total Count	Available Count	Waitlist Count
OPW24_WS_R_BUDDANO MED	REMOTE - Introduction to Buddhism	1/19/24	1/19/24	9:30 AM	11:30 AM	9:30-11:30am	Zoom	Edgerly	Heather	13	12	0
OPW24_WS_R_CONQUAN EFFHALF	REMOTE - Is Consciousness a Quantum Effect?	1/19/24	2/2/24	9:30 AM	11:30 AM	9:30-11:30am	Zoom	Kercel	Stephen	5	15	0
OPW24_C_R_CLIMHOPE	REMOTE - Journey from Climate Doom to Active Hope	1/10/24	2/14/24	12:45 PM	2:45 PM	12:45-2:45pm	Zoom	White	Thomas	2	13	0
OPW24_WS_R_MYTHVICT	REMOTE - Mythology in the Mansion: Classical Mythology and Victorian Culture	1/19/24	1/19/24	9:30 AM	11:30 AM	9:30-11:30am	Zoom	Cook	Brittany	14	26	0
OPW24_WS_R_FRED_GINGER	REMOTE - Perfection: The Best of Fred & Ginger	1/26/24	1/26/24	9:30 AM	12:00 PM	9:30-12pm	Zoom	Marzagalli	DeWayne	20	0	3
OPW24_C_R_CLEAN	REMOTE - Practice of Swedish Death Cleaning	1/11/24	2/15/24	12:45 PM	2:45 PM	12:45-2:45pm	Zoom	Rich	Barbara	12	0	13
OPW24_C_R_NON-SCI	REMOTE - Science for Non-Majors	1/9/24	2/13/24	12:45 PM	2:45 PM	12:45-2:45pm	Zoom	Scheintaub	Hal	7	8	0
OPW24_C_R_SEE88	REMOTE - Seeing for Life-Clear Vision to Age 88 & Beyond	1/10/24	2/7/24	9:30 AM	11:30 AM	9:30-11:30am	Zoom	Kershner	Robert	8	32	0
OPW24_WS_R_HOLMES	REMOTE - Sherlock Holmes: "A Study in Scarlet"	2/2/24	2/2/24	9:30 AM	11:30 AM	9:30-11:30am	Zoom	Marzagalli	DeWayne	20	0	15
OPW24_C_R_SUFIS	REMOTE - Sufis	1/11/24	2/15/24	9:30 AM	11:30 AM	9:30-11:30am	Zoom	Smith	Zaid	10	20	0
OPW24_C_R_SCOURT	REMOTE - Supreme Court Effect on American society	1/10/24	2/14/24	12:45 PM	2:45 PM	12:45-2:45pm	Zoom	Libby	Robert	16	14	0
OPW24_C_R_TVCRIME	REMOTE - TV Crime/Mysteries European Style	1/11/24	2/15/24	12:45 PM	2:45 PM	12:45-2:45pm	Zoom	Solano	Ed	17	13	0
OPW24_C_R_CHILDAB	REMOTE - Understanding Child Abuse and the Societal Response	1/10/24	2/14/24	12:45 PM	2:45 PM	12:45-2:45pm	Zoom	Ricci	Lawrence	1	23	0
OPW24_WS_R_VERDI	REMOTE - Viva Verdi!	1/26/24	1/26/24	9:30 AM	11:30 AM	9:30-11:30am	Zoom	Lewis	Calien	18	12	0
OPW24_C_R_HEART	REMOTE - Voice Of The Heart	1/10/24	2/14/24	12:45 PM	2:45 PM	12:45-2:45pm	Zoom	Donaldson	Jennifer	9	5	0
OPW24_WS_R_VOICE	REMOTE - Voice-Overs: Now Is Your Time!	1/24/24	1/24/24	6:30 PM	8:30 PM	6:30-8:30pm	Zoom	Kamp	Will	2	18	0
OPW24_C_R_BEING	REMOTE - Well Being: What Is It?	1/10/24	2/14/24	9:30 AM	11:30 AM	9:30-11:30am	Zoom	Piker	Steven	1	19	0
OPW24_C_R_WHTY	REMOTE - What Happened to You?	1/10/24	2/14/24	9:30 AM	11:30 AM	9:30-11:30am	Zoom	MacDugall	Linda	2	12	0
OPW24_C_R_ENERGY2	REMOTE - What Is Energy, and How Do We Use It?	1/10/24	2/14/24	9:30 AM	11:30 AM	9:30-11:30am	Zoom	VonSeegern	David	4	16	0
OPW24_WS_R_LEGACY	REMOTE - Writing a 'Legacy Letter'	1/26/24	1/26/24	9:30 AM	11:30 AM	9:30-11:30am	Zoom	Sherwin	Jay	5	20	0
OPW24_WS_R_YOGAHB	REMOTE - Yoga for Healthy Bones	2/12/24	2/12/24	2:00 PM	3:00 PM	2-3pm	Zoom	Sirota	Lyn	15	10	0
<b>Totals: (39 items)</b>										478		

Name	Cell Phone	Eve Phone	Email	Course Title	Faculty Name	Waitlist Date	Created Time
				REMOTE - Sherlock Holmes: "A Study in Scarlet"	DeWayne Marzagalli	12/13/2023	8:56 AM
				REMOTE - Sherlock Holmes: "A Study in Scarlet"	DeWayne Marzagalli	12/13/2023	9:13 AM
				REMOTE - Sherlock Holmes: "A Study in Scarlet"	DeWayne Marzagalli	12/13/2023	9:45 AM
I removed all the personal the data but this was all populated.				REMOTE - Sherlock Holmes: "A Study in Scarlet"	DeWayne Marzagalli	12/13/2023	10:08 AM
				REMOTE - Sherlock Holmes: "A Study in Scarlet"	DeWayne Marzagalli	12/13/2023	11:14 AM
				REMOTE - Sherlock Holmes: "A Study in Scarlet"	DeWayne Marzagalli	12/13/2023	11:28 AM
				REMOTE - Sherlock Holmes: "A Study in Scarlet"	DeWayne Marzagalli	12/13/2023	11:49 AM
				REMOTE - Sherlock Holmes: "A Study in Scarlet"	DeWayne Marzagalli	12/13/2023	4:54 PM
				REMOTE - Sherlock Holmes: "A Study in Scarlet"	DeWayne Marzagalli	12/13/2023	7:41 PM
				REMOTE - Sherlock Holmes: "A Study in Scarlet"	DeWayne Marzagalli	12/14/2023	9:11 AM
				REMOTE - Sherlock Holmes: "A Study in Scarlet"	DeWayne Marzagalli	12/14/2023	10:43 AM